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ABSTRACT

This guidebook was developed to help businesses provide high-quality worksite learning experiences for students. It combines experiential knowledge from experts with that of mentoring programs across the country to reduce the task of planning and implementing quality worksite learning experiences to a logical process. The book offers guidance for conducting the following activities: (1) developing a high-quality mentoring program; (2) recruiting, training, and supporting worksite mentors; (3) planning and implementing worksite learning experiences; and (4) evaluating the results. The guidebook is organized in four sections. Section 1 helps the reader determine appropriate parameters for their program and create a management structure to support it. Section 2 helps businesses to develop a pool of skilled mentors. Section 3 gives detailed guidance for delivering high-quality worksite learning experiences and evaluating results. Section 4 and the includes forms to support mentoring efforts. Appendices contain the following: annotations of 20 print and organizational resources; table of contents of a related guide; fundamentals of worksite mentoring (communication tools, understanding the audience, learning, legal issues, involving unions, and equity issues); and definitions of workplace skills from the Secretary's Commission on Achieving Necessary Skills. (KC)

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Worksite Mentoring Guidebook:

Practical Help for Planning and Implementing QUALITY Worksite Learning Experiences

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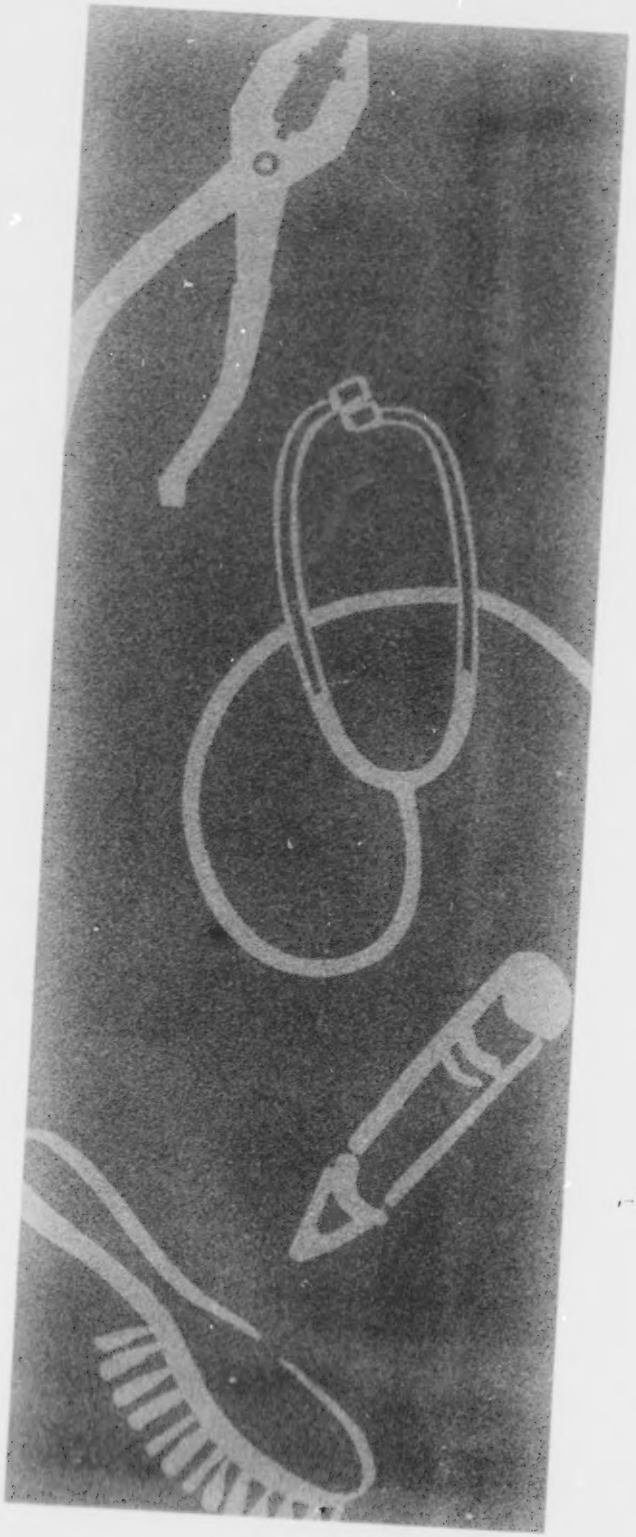

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CONTENTS

Page

Key Terms v

Worksite Mentoring: Executive Summary 2

Introduction 4

Section 1: Developing a Quality Worksite Mentoring Program 6

- 1.1 Visible Support by Company Leaders 7
- 1.2 Program Planning 7
- 1.3 Standard Program Materials 12

Section 2: Recruiting, Training, and Supporting Worksite Mentors 14

- 2.1 Recruiting Mentors 14
- 2.2 Training Mentors 15
- 2.3 Ongoing Training and Support 18

Section 3: Planning and Implementing Quality WSLEs 20

- 3.1 An Efficient, Manageable Method for Writing Training Plans 20
- 3.2 Four Steps to Quality Worksite Training Plans 26
- 3.3 Implementing Worksite Learning Experiences 36
- 3.4 Evaluating the Results 37

Section 4: Forms for Worksite Learning 40

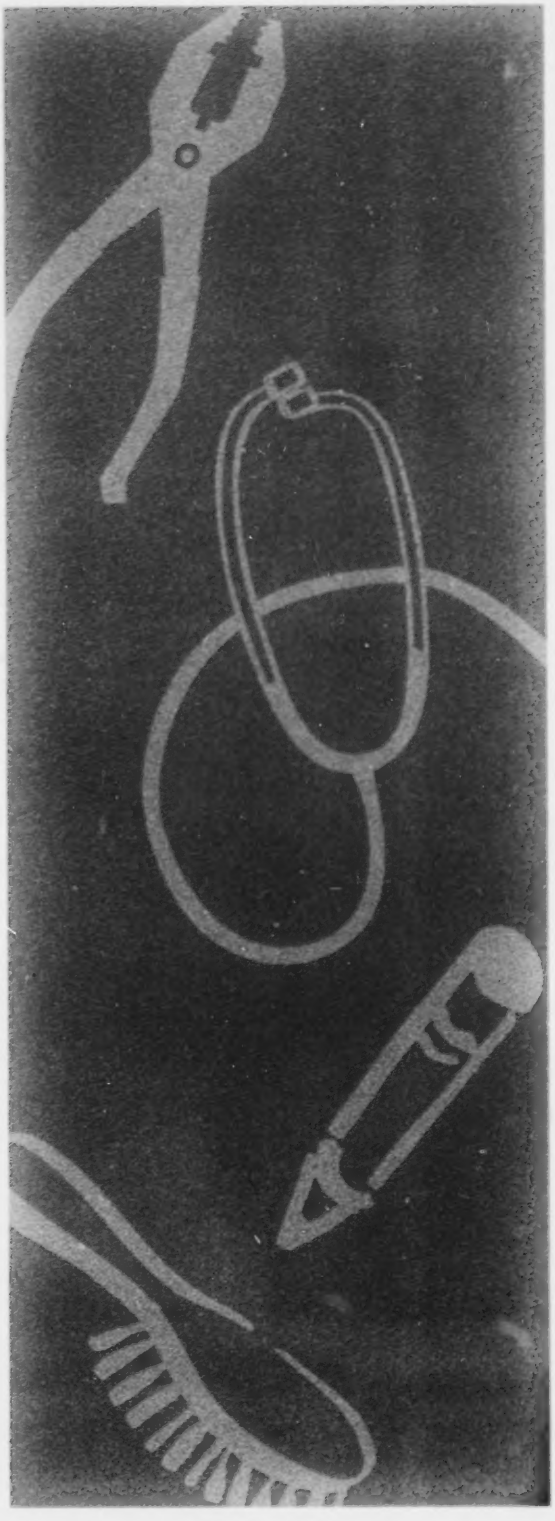
Appendix A — Resources 58

Appendix B — Companion Book Resources 61

Appendix C — Fundamentals for Quality Worksite Mentoring 65

- ⇨ C-1 Communication Tools 66
- ⇨ C-2 Understanding Your Audience 69
- ⇨ C-3 About Learning 72
- ⇨ C-4 Legal Issues 73
- ⇨ C-5 Involving Unions 75
- ⇨ C-6 Equity Issues 76

Appendix D — SCANS Definitions 77



Notes

Key Terms

Companion Books. This guidebook is the third in a series that supports the integration of school and work-based learning. Its two companion books prepare teachers and students to get the most from worksite learning. Appendix B gives more information about the companion books.

Lead Mentor. The employee assigned to manage the company's worksite mentoring program. Typically performs all or most of the functions described in the illustration on p.3.

Mentee. The person coming to the worksite to learn. Often a high school student or teacher, but increasingly mentees come from elementary and middle schools, colleges, and social programs.

Mentor. A trusted, experienced, and interested person who guides another. Guidance can be personal, professional, or a combination of the two; and it is either broad or narrow in scope. This guidebook deals with worksite mentors only (see definition below).

Mentorship. Another term for a worksite learning experience.

Partner. Often a school district or local school. Can also be a technical school, two-year or four-year college, social service agency, Chamber of Commerce, or community group.

Quality Mentoring. Structured worksite learning experiences that (a) provide an overview of the business through a plant tour and a visit with key company personnel, then (b) pair a mentee with one or more "front-line" workers to listen, ask questions, observe, and complete hands-on activities. Upon completing a quality mentoring experience, the mentee should gain "a set of behaviors, attitudes, and skills necessary to perform effectively in a work setting" (Grubb, W. Norton, 1995, p. 177). Quality mentoring cannot be achieved by touring a facility or completing a mindless job.

SCANS. An acronym for Secretary's Commission on Achieving Necessary Skills. At the request of the Secretary of the U.S. Department of Labor, the commission generated a list of abilities and skills that all high school students should possess by the time they graduate. The first report was published in 1991 and an update followed in April 1992. The SCANS competencies list can be found in Section 3.1; definitions are listed in Appendix D.

Worksite Learning (WSL). Another term for mentoring. Used to indicate learning that takes place at a job site. The actual training activity is called a Worksite Learning Experience (WSLE).

Worksite Mentor. A worksite mentor provides career awareness, exploration, and preparation. An employee of the business partner, he/she possesses skills and knowledge needed by the mentee and is equipped to train, challenge, and support the mentee.

Worksite Learning Continuum

	Field Trip	Shadow	Mentor	Intern
Purpose	Snapshot of the work world	Career awareness and exploration	Acquire broad, general skills and attitudes for job and life success	Acquire specific skills and knowledge for a specific career area
Learning Content	Tour of workplace	Observing employees, often at multiple sites	Working one-to-one with a mentor and multiple trainers for broad on-the-job training in career choice	May begin like mentoring, but moves quickly into completing extended projects/ tasks, often for pay
Length	1-3 hours	2-30 hours	3 weeks-9months	3 months-2 years

Note: Many of the techniques and suggestions found in this guidebook can be adapted for use with the other types of WSLEs outlined in this continuum.

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Worksite Mentoring: Executive Summary

Because our goal is to deliver comprehensive information for quick understanding and application, it is especially important to create a common foundation from the start. Therefore, if you haven't already reviewed the definitions on p. v, please stop and review them now. Then study this Executive Summary on mentoring so that we're all wearing the same pair of glasses as you begin to use this guidebook.

What Is Worksite Mentoring?

Unfortunately, "mentoring" has been used loosely over the past several years to represent everything from job shadowing to internships to substitute fathering. Such wide use of the word has resulted in confusion about what is meant by worksite mentoring. Adding to the confusion are varied definitions of workplace learning initiatives found in books and actual workplace learning programs. To bring clarity to the situation, we combined definitions found in the research with the insights of experienced mentoring companies to create a worksite learning continuum. Illustrated on p. 1, it outlines the most common WSLEs by purpose, learning content, and length. Mentoring is highlighted for your convenience.

Why Mentor?

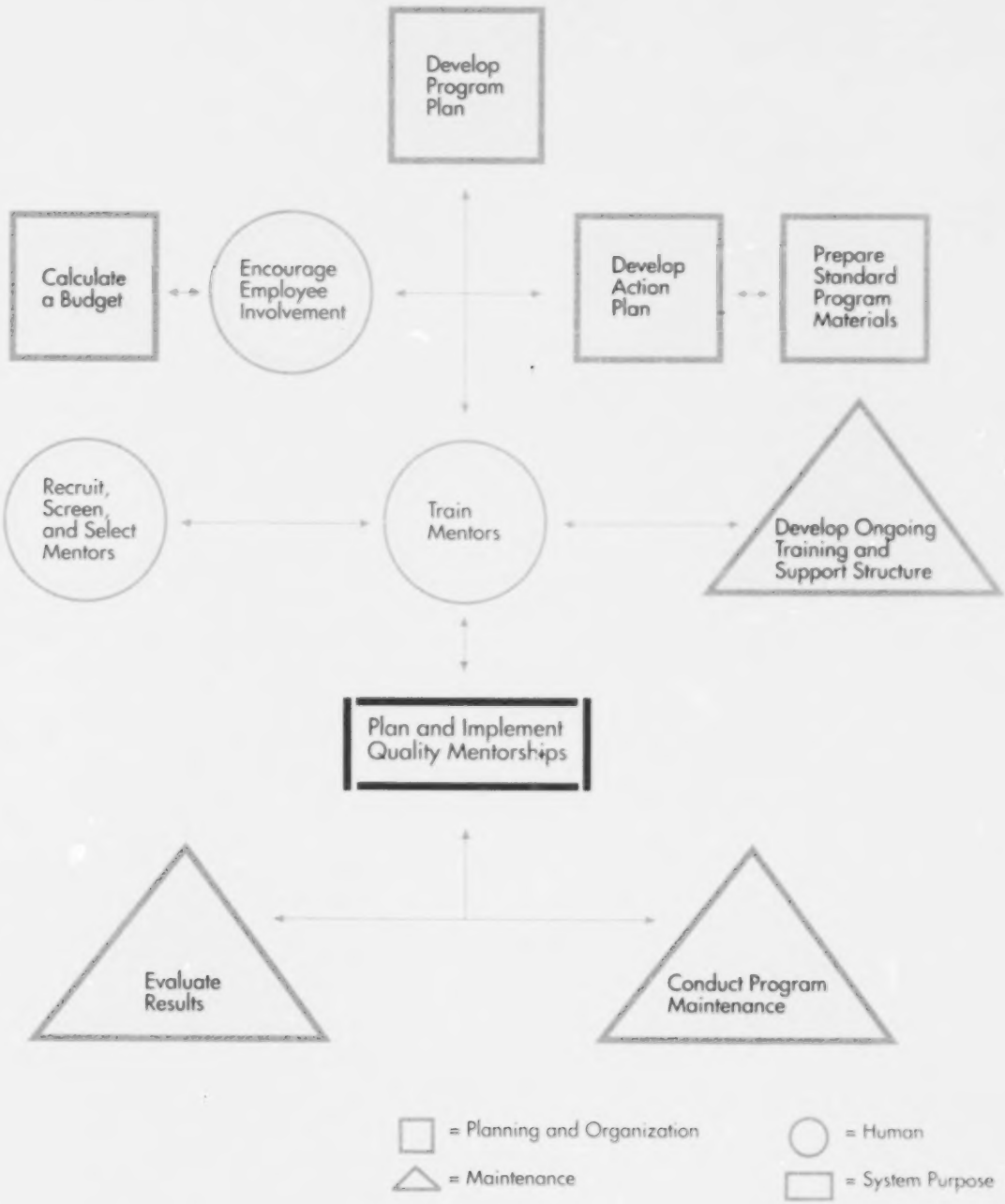
Businesses cite varied reasons for conducting a mentoring program, from developing a pool of trained people for temporary jobs to motivating current workers. Research indicates that first and foremost, they mentor for the survival of their businesses. Companies are realizing that a highly competitive workforce is the key to long-term survival in a global market. They find that mentoring helps them create a more competitive workforce. Examples include:

- ✓ Mentee graduates create a well-trained pool of potential employees.
- ✓ Mentoring helps participants understand that college is not the only way to land a solid, high- paying career. As one participating expert explained, "We consistently pay $65,000 and more to high school grads."
- ✓ Quality mentoring requires employees to acquire the same skills needed by a highly competitive workforce.

In addition, new research findings indicate that employers are impacting profits directly through mentoring. Researchers for The National Employer Leadership Council (NELC) found that many companies are realizing a profit from their worksite learning efforts. The NELC report states, "... Companies were earning a return on investment ranging from 38 cents on the dollar to as much as $5.00." (Ohio School-to-Work Office newsletter, Summer 1998, p. 1). For a copy of the report, contact the NELC directly through the office listed in Appendix A.

A Quality Mentoring Program's Management System

Achieving quality in any significant endeavor requires a management system that includes human, planning and organization, and maintenance elements. A management system designed to drive quality mentorships is illustrated below. Only the first task, Develop Program Plan, must be completed first. The remaining elements interrelate and are not implemented in a step-by-step fashion. Rather implementation of these elements should be customized to your program's needs.



Introduction

The *Worksite Mentoring Guidebook* was published to help businesses conduct quality worksite learning experiences. It combines experiential knowledge—what works and what doesn't—from our participating experts with that of mentoring programs across the nation to reduce the task of planning and implementing quality worksite learning experience to a logical process. The book offers concise and comprehensive guidance for conducting the following activities:

- ✓ *Developing a quality mentoring program*
- ✓ *Recruiting, training, and supporting worksite mentors*
- ✓ *Planning and implementing quality WSLEs*
- ✓ *Evaluating the results*

Our participating experts drove the writing of the book—from format to content to organization of information. In fact, our business stakeholders articulated a single workplace reality that directed the entire writing process:

> Employers who mentor want to conduct both mentoring and daily business operations really well.

Because we recognize and respect this difficult challenge, we incorporated practical wisdom throughout the guidebook in the form of *time savers*. These are designed to reduce the time and resources needed to **conduct a quality mentoring program** by helping you:

- •Avoid "reinventing the wheel."
- •Identify potential problems and ways to avoid them.

This guidebook **helps with daily operations** as well. The mentoring methods it describes have a proven track record, and the businesses that implement them not only provide quality worksite learning for mentees but also **strengthen their workers** in precisely the skills required for enhanced competitiveness. Employees involved in mentoring develop expertise in communication (e.g., listening, recording, questioning, confirming), conflict management, leadership, organization, planning, reporting, assessment, and more.

The illustration on page 3 outlines the management system requirements for conducting **quality** worksite mentoring (see definition, p. v). As the chart shows, *quality* mentoring requires a solid investment. Yet, only quality WSLEs are **worth** the investment of your company's time and resources. "Simply getting students out of the classroom and into a workplace does not guarantee that they will learn anything significant or transferable. In fact, ill-designed workplace experiences, like ill-designed and poorly delivered classroom instruction, can damage and demotivate students" (Goldberger, S., R. Kazis, and M. K. O'Flanagan, January 1994, p. 35). In short, if you mentor, do it with quality to ensure return on your investment.

The challenge, then, is to make your company a quality learning site for mentees, while continuing to run your business competitively and successfully. The *Worksite Mentoring Guidebook* helps you meet this challenge by providing **practical mentoring tools for building quality into your WSLEs**. Section 1 helps you determine appropriate parameters for your program and create a management structure to support it. Section 2 helps you develop a pool of skilled mentors. Section 3 gives detailed guidance for delivering quality worksite learning experiences and evaluating results. And Section 4 and the Appendices contain valuable samples, forms, and resources to further support your mentoring efforts. Be sure to take special note of Appendix C because it provides an important **knowledge base** upon which to build your program.

Although your mentoring program may possess and use the quality mentoring tools outlined in this book, it can still fail because of school/agency problems, such as poor mentee selection or preparation. Therefore, **choosing a mentoring partner** is just as important to the success of a WSL program as mentoring tools. Many of the resources listed in Appendices A and B can help you choose an appropriate partner and/or negotiate quality improvements with your present partner. Participating experts *strongly urge* companies to manage mentoring like any other business partnership, e.g., negotiate acceptable parameters, hold the partner accountable, check partner readiness before proceeding.

Section 1: Developing a QUALITY Worksite Mentoring Program

Is your company positioned to get the best return on its mentoring investment? The following checklist will help you answer that question.

Quality Mentoring Checklist

Instructions: Review the following conditions. Circle or highlight any that you believe your company *cannot* or *would not* create.

1. The program is guided by visible leadership support.
2. The program pursues a systematic approach, e.g., start small in size and duration so both employees and the school/agency partner can build expertise and refine the program.
3. Mentors and administrative personnel are volunteers.
4. Both mentors and mentees complete a careful selection process.
5. Mentors and support personnel (e.g., presenters, lead mentor) receive training.
6. Ongoing support is provided to mentors and mentees from leaders, the mentoring program, and the school/agency partner.
7. Mentors are given parameters for training mentees but also are allowed flexibility within the program framework to add their experiential knowledge and professional expertise.
8. All parties expect and are prepared to address potential problems.

(Adapted from Mahlman, R., June 1995.)

Did you mark any conditions? If yes, think carefully before proceeding with a mentoring program. Extensive research reveals that *all* **conditions are necessary for implementing a quality mentoring program**. Most companies that are operating mentoring programs are still working to improve in several areas, but all conditions are present.

Guidance for creating these conditions in your program is provided in the *Worksite Mentoring Guidebook*. Section 1 helps you prepare your company to host mentees by laying a **solid foundation through planning**.

Companies need to be equally **cautious about unrealistic expectations.** Do not expect that your mentoring program can reverse years of inadequate education, prejudicial barriers, and family-based problems. WSLEs can have a positive impact—even with tough cases—if the program contains the elements described in this book and if the mentee is receptive to learning. The tough cases may require more time and patience, but these mentees often become more responsible and committed workers because they've had to overcome adversity.

1.1 Visible Support by Company Leaders

No major initiative, especially a training initiative, can succeed unless someone with a wide span of control clearly communicates, "We are making this program a priority." This message must be sent at the program's inception and consistently thereafter. The following checklist describes actions that demonstrate leadership support for mentoring. Complete it to see if your company meets the requirements.

Measurements for Leadership Support

- ☐ Company executives help workers see how mentoring contributes to company goals.
- ☐ Executives mentor subordinates and participate in the worksite learning program.
- ☐ The program has a budget.
- ☐ A qualified lead mentor or program manager has been given implementation responsibility.
- ☐ Positive reinforcements for those involved in the program are visible. For example, mentoring results in better performance evaluations and is a significant factor in promotion decisions.
- ☐ Mentoring activities are well-communicated throughout the organization.
- ☐ Mentors are given training and support. For example, mentors are given ample time to prepare for and conduct WSLE activities.

(Adapted from Mahlman, R., June 1995.)

Will company executives make all of the commitments outlined? If not, veteran mentoring companies recommend delaying your WSL efforts until each leadership support measurement can be satisfied.

1.2 Program Planning

Effectively coordinating a mentoring program can be relatively simple and time efficient, if a company invests the time to **plan and create a solid foundation** as illustrated in the Quality Mentoring Program Management System, p. 3. Subsection 1.2 provides the best practical wisdom from the experts for creating each piece of your program plan.

Developing a Program Plan

Program design (e.g., length of mentorships, number of worksites involved, specific learning tasks, complexity of training) varies dramatically among even the most successful programs. Research shows that mentees learn equally well in each of these situations, as long as the key conditions (Quality Mentoring Checklist, p. 6) are implemented. Thus, program specifics are best decided based on the needs of everyone involved and on the goals of your program. The *Worksite Mentoring Guidebook*, therefore, provides a **framework** for designing your program. Use it as a starting place, rearrange the elements as necessary for your unique situation, and fill in the details.

Step 1: Form a planning team.

- A **company executive** who chairs meetings and maintains program momentum should lead the team. In programs that host more than a few mentees, this "program driver" finds a lead mentor to manage the daily functions of the program.
- The **lead mentor** should be a volunteer with HR/training expertise and enough span of control to negotiate personnel resources for the program. A lead mentor manages the program design process and implements the program. Note that in very small programs, the company executive may be responsible for the lead mentor's duties (see Roles and Responsibilities chart on p. 9).

- One or more **hourly workers** (depending on the company size) should be included at the outset. Be sure to listen to their concerns and address them fairly and adequately. Real worker involvement now will increase employee motivation to volunteer later.
- Staff members with expertise in **training, quality, and accounting** should be included in the planning team. Assistance from legal, public relations, and administrative staff should be sought individually, as needed. Note: In smaller companies, one employee may represent several areas.
- Include an influential **union representative**, as explained in Appendix C-5.
- One or more **partner representatives** (e.g., partner liaison, teachers, coordinator) must remain involved throughout the planning process to provide the partner's lens for planning program specifics and ensure that mentee-side elements of the program are implemented.

Be sure that each planning team member understands the team's purpose: to design a program foundation and guidelines for delivering WSLEs—**a structure for mentors to "plug into."**

Some companies find it more cost-effective to hire a consultant to design the mentoring program. Be sure to hire someone who is experienced in planning WSL programs and give him/her easy access to all necessary personnel. In addition, the consultant will need to work directly for a company executive and/or lead mentor to attain credibility and to prepare the appropriate employee(s) to implement the program.

Whether you invest money in a consultant or commit staff resources to complete your program planning, it's worth the investment, because *weak company planning for conducting mentorships is like asking workers to build a house without an architect's plan or assemble a car without an assembly line.*

Step 2: Develop a purpose statement, measurable goals, roles and responsibilities, and policies.

The planning team should commit the time necessary to negotiate these items. **Teamwork** research shows that by integrating *everyone's* perspectives, a project covers all potential problems and important details, and company commitment soars. For optimum benefit, *be sure a strong facilitator leads these team negotiations.*

Start with a draft purpose statement and goals. Next rewrite the goals into measurable statements that include how you will measure each goal. For example, if one of your goals is to help mentees recognize that high-paying jobs are available without a college degree, you would reword your goal to state, "Mentees will list on their final reports at least X [number of] jobs that pay more than $X and are available to high school graduates." If one of your goals is to help mentees take responsibility for their learning, you would reword your goal to state, "Mentees will add at least 5 personal learning goals to those established by the program."

When your purpose statement and measurable goals are complete, you're ready to work out **roles and responsibilities** (or management structure). Be specific and avoid ambiguity. As you draft responsibilities for a role, review them through the lens, "Could I fulfill that role using this list of responsibilities?" The table on p. 9 provides a sample.

Most mentoring companies also create a personnel chart that shows all employees who are involved in the program, such as the company executive, lead mentor, planning team, presenters, mentors, lead contacts in each department, and trainers in each department. This chart and the roles and responsibilities table combine to form a **well-defined management structure** for efficient and effective implementation of your worksite learning program.

Sample Roles and Responsibilities of Mentoring Program Participants

Team Member	Role	Responsibilities
Partner Liaison	Manages school/agency-based portion of mentoring program	Functions as lead contact person. Provides qualified mentees. Monitors mentees' progress; evaluates results. Assists with problems. Provides links to school-based learning.
Teacher(s)	Assists partner liaison	May assist with some or all of the partner tasks listed. Often provides input for training plans and supports links to classroom learning.
Company Executive	Drives Program	Has decision-making authority over company resources. In small programs, may also handle lead mentor roles and responsibilities.
Business Liaison (Lead Mentor)	Manages work-based portion	Serves as lead contact person for company. Manages program design process. Implements program, including mentor selection and training, program documents, quality checks, evaluations, progress reports, and budget.
Worksite Mentor	Implements WSLE	Guides, coaches, instructs mentee. Writes training plan. Prepares co-workers to provide on-the-job training. Monitors, evaluates, and records progress. Provides feedback to mentee and lead mentor.
Mentee	Learns and cooperates	Follows all company policies and procedures. Assists with training plan development. Completes training plan. Asks questions and seeks help, when needed. Functions as a positive work-team member. Attends every day, arrives on time. Records progress.
Parent/Guardian*	Guides and supports mentee and program	Signs permission forms. Assists with training plans. Attends events, as requested. Monitors mentee progress. Contacts partner liaison with concerns.

*If mentee is not an adult.

Develop **policies** last, because the previous program elements will determine their content. For policies related to your *mentors*, review your employee handbook. If necessary, write an addendum to add reward systems and other HR policy changes created by the mentoring program. *Mentee* policies, as well as standard program documents, do not require planning team direction. The lead mentor should work with the partner liaison and appropriate company employees to develop these documents. Section 1.3 provides guidelines.

Step 3: Prepare a written plan.

After completing Step 2, capture the plans for every program element handled to this point in a mentoring plan document. Both the business and the school/agency should sign it, because this document represents your partnership agreement for the mentoring program.

Step 4: Calculate a budget.

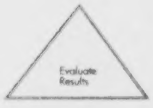
- Be sure to plan for personnel costs such as overtime and administrative support.
- Expenses might include refreshments at orientations and training sessions, document preparation, and training costs. Be sure to project both start-up and maintenance costs.
- This is a great time to call on your best accounting expert for help.
- Document your final budget and add a copy to your signed program plan.

Step 5: Encourage employee involvement.

- It is important to recognize that workers will be more receptive to mentoring outsiders if the company has a record of commitment to employee training and development.
- Openly communicate the program plan created in Step 2 to all employees. Your goal is to describe the program, why the company is implementing it, how workers will benefit from it, and how to get involved. You also want to create enthusiasm.
- The mentoring committee chair should drive the presentations.
- Ask your PR and HR departments to help you meet your communication goals.

Step 6: Prepare an action plan.

- The lead mentor will probably prepare this plan, which is similar to an annual business plan.
- Topics covered include coordinating and scheduling mentee placements and training schedules, coordinating and scheduling group elements of the training (e.g., orientation, panel discussions), and planning and scheduling mentor training sessions. Specific tasks will depend upon your program circumstances.
- Participating experts recommend starting small, e.g., 1-3 students for no longer than 6 months.
- Add your action plan(s) to your previously completed planning documents.



Step 7: Design an evaluation process and evaluation tools.

Quality mentoring demands an evaluation process. It should be built into the program during the planning phase to ensure program goals are met, check return on investment (ROI), and make improvements. These criteria can help you design evaluation elements that fit your program needs:

- An **exit survey** is an appropriate mentorship evaluation.

- **Informal feedback** (e.g., one-to-one conversations with program participants, daily reports, journals) gathered throughout the program provides more detailed information than one exit survey. Use informal feedback to supplement the exit data and monitor WSLE quality during delivery.
- There is an increasing trend toward **program evaluation** (also called process evaluation). However, the trend lacks specific, common criteria and methods. Researchers and program developers tend to check plan against actual outcome (i.e., Did the program achieve the goals it set out to achieve?). Such comparisons can be a solid means of evaluating a program, as long as measurable goals are defined at the beginning of the program, as discussed in Step 2.
- The most critical time to conduct a program evaluation is after the first year.
- As part of your program evaluation, assess your ROI. Is the program providing the benefits you desired, such as improved worker skills? Include this information in your regular reports.

Design your own program evaluation system by employing the same methods and criteria used in your company to measure such items as safety, quality, productivity, and training effectiveness.

Step 8: Outline a strategy for program maintenance.

For purposes of this guidebook, program maintenance is defined as preparing regular reports, implementing quality improvements, and managing the daily operations of the program.

- **Reports** should contain background information (e.g., program purpose and goals, services provided, an events time line, resources expended), a summary of qualitative and quantitative data, and 2-3 case examples delivered in video form and/or by actual participants. Qualitative data is often gathered in exit surveys and journal entries, while quantitative data includes the number of completed WSLEs and mentor training statistics.
- Ask your quality experts to help you **build quality into your program** based on your unique situation.
- Some examples of **quality mechanisms** that work for others include strong documentation and evaluation systems, and visible assessment of the quality of mentoring participation during evaluation and promotion processes.
- It is especially important for the lead mentor to *make the time* to review the data collected during program implementation and use it to **generate improvements**. Making such data a standard part of regular program reports helps quality improvements remain a priority.
- Other important **maintenance tasks** include keeping a strong pool of mentors through recruitment, training, and support; regularly communicating mentoring program results and highlights to all employees; maintaining enthusiasm; updating schedules; and strengthening partner relationships. Remember to call on veteran mentors for assistance, especially when recruiting, training, and monitoring new mentors.

Step 9: Use your program plan.

Be sure to record your plans for evaluations, reports, quality improvements, and management of the daily operations of the program. Add this written strategy to your program plan, budget, and action plan to complete your program planning documents. Store them in a folder or notebook, but don't let them collect dust. **These documents should become well-worn** as you refer to them frequently to conduct program operations.

Diligent planning can help you avoid these problems experienced by your predecessors:

- ✓ The mentor is not given enough relief from daily duties to work effectively with the mentee.
- ✓ Ambiguous roles and expectations of program participants result in weak implementation.
- ✓ Mentee gains very little knowledge because of unfocused training.
- ✓ A mentoring relationship languishes as a result of a personality conflict because there is no contingency plan for a poor mentor/mentee match.

1.3 Standard Program Materials

Creating standard program materials will ensure **efficient program operation** by providing

- ✓ Standard forms that are quick to use but provide comprehensive information.
- ✓ Information that all parties (e.g., executives, supervisors, mentors, parents, partner liaison) need for conducting quality WSLEs.

Standard documents can be helpful in the activities described in this section:

Mentee recruitment—to provide enough information about the company and the WSLEs offered to let a mentee make informed choices about whether to apply and what to study.

Mentee orientation—to begin building rapport and expectations and help ensure that the mentee is fully equipped to enter the workplace.

Mentor training—to instruct workers in program logistics, audience and company expectations, mentoring effectively, and more.

Supervisor/trainer preparations—to help workers understand the program goals, company expectations, audience needs, and how to effectively perform their program duties.

Mentee training—to increase mentees' knowledge of the work world, including career and pay opportunities, employer expectations, skills needed for success, and use of academics. Companies recognize, however, that documentation can become cumbersome, so successful mentoring programs **avoid duplication**, using the guidelines explained below.

- ✓ Request sample documents from your partner before preparing program documents. Then work with them to adopt and/or adapt appropriate documents for joint use.
- ✓ Recognize that much of the documentation prepared for partner needs also helps mentors prepare for WSLEs. Therefore, watch for consolidation and multiple uses when developing all program materials. For example, if a mentoring program handbook is needed, use one book for both mentors and mentees and include only information that is not available in other company documents. In this way, the handbook can be used for such multiple purposes as mentor training, parent information, and mentee orientation.
- ✓ "Cut-and-paste" and copy liberally from company documents already in use. Review new employee and/or guest orientation packets, application documents, and marketing materials, then use copies of these and relevant pages in the company handbook to develop program documents.

A **menu of typical documents** and their contents follows. Use these in preparing your program documentation. Remember to watch for consolidation and multiple use opportunities.

Document	Contents
Welcome letter	Company, program, and mentor information geared toward reducing mentee anxiety—makes recipient feel welcome
Company background	Organization chart, mission statement, product/service description(s), standard company practices followed by all workers
Program information	Goals, hours/days, roles and responsibilities
Program instructions	Parking, reporting location, orientation agenda, lockers, maps
Autobiography	Essay/form completed by mentors/mentees (samples in Section 4)
Workplace rules	Safety, attendance, dress/appearance
Training options	Functional areas, sample tasks mentees can study (see Section 3)
Job descriptions	Samples of what jobs require; include one for mentees
Application forms	Experience with work world requirements; require mentees to complete successfully for program acceptance
Glossary	Worksite terms and their meanings, including common acronyms (e.g., HR) and company/industry jargon
Hiring/promotion criteria	Factors considered for employment and promotion
Note: Training plan and evaluation forms are covered in Section 3. See Section 2 for mentor-specific forms.	

Section 2: Recruiting, Training, and Supporting Worksite Mentors

Mentors' responsibilities begin where those of the planning team and lead mentor end. Thus, **mentors are the most critical link** between program planning and the implementation of *quality* WSLEs. The Roles and Responsibilities chart on p. 9 lists a worksite mentor's responsibilities. Section 2 provides guidance for recruiting mentors and equipping them to carry out these important activities.

2.1 Recruiting Mentors

Before beginning the recruiting process, determine **how many mentors** you need. Experts recommend one mentor for each mentee. Thus, if your program plan calls for hosting 5-7 mentees per group, you'll need to start with at least 7 mentors. You may want to double that number to cover attrition and save training time.

Experienced mentors urge companies to **separate mentees**. Their mentees learned 80% more when working one-on-one with an adult. When mentees train in groups, peer pressure takes over and they tend to "hang with buds" rather than connect with the workplace and the trainer/mentor.

Next, determine your **selection criteria**. You are seeking high-potential workers—those who already possess decent skills and work habits but could use some honing and/or sophistication. High-potential mentor candidates should have the following traits:

- Communication skills (cited by veterans as the most important skill requirement)
- Patience (cited by veterans as the second most important skill requirement)
- Desire to share knowledge and experience to help another; may already demonstrate this desire with fellow employees
- Personal/professional interest in the development of those in your company's mentee audience
- Supportive, encouraging, and sincere personality style
- Enthusiasm for learning
- Respect for mentees; sees them as peers despite possessing more expertise than the mentees
- Good attendance, including punctuality
- Good performance reviews

In addition, check applicants' community involvement and work histories. Those who enjoy volunteer work and have conducted mentor-like activities (e.g., social work, training/teaching, employment counseling) in the past can be considered high-potential candidates.

Be sure these criteria are openly communicated—posted, distributed at employee information meetings, and included in employee handbook—*before* seeking volunteers. It's also a good idea to attach the list to your mentor application. A sample application can be found in Section 4.

Now you're ready to **seek volunteers**. The following recruiting methods have a solid track record.

- Provide a volunteer sign-up station at the program presentation to all employees.
- Ask members of the planning team to recruit face-to-face.
- Create an environment in which mentoring is "the thing to do" (e.g., reward systems, recognition, newsletters, awards).
- Provide a solid support system to help workers feel comfortable taking on the mentoring challenge. Regular opportunities for sharing, problem solving, and learning help reduce workers' fears.
- Recruit any mentees who become permanent employees.

Once your mentoring program is underway, mentors can recruit fellow employees.

Volunteers should undergo a **selection process**, even if you don't have enough volunteers. An 80/20 rule works well. If an applicant meets at least 80% of the qualifications, then work with him/her to develop the other 20%.

The mentor selection process is similar to screening job applicants. Review applications against your selection criteria and weed out anyone who is seriously deficient in any area. Conduct interviews with the rest, using a standard set of questions with every applicant. Compare answers against the selection criteria. And don't forget to give a **communication skills test,** as explained in Appendix C-1.

Be candid throughout the process about qualifications and the challenges of mentoring. You'll avoid dropouts and unsatisfactory performance later. In addition, watch for these **warning signs:**

- ✓ Doesn't have enough time to commit to the program
- ✓ Seems to be volunteering for status or job promotion reasons
- ✓ Holds rigid opinions and doesn't seem open to new ideas
- ✓ Seems too concerned about what a mentee can do for him/her
- ✓ Wants to be a mentor to work out problems from his/her own past
- ✓ Doesn't have skills that match the program's needs
- ✓ Has a criminal record
- ✓ Has a history of child abuse allegations/convictions

(Adapted from Workforce Opportunities Resource Consortium, July 1996.)

Any *one* of the warning signs is just cause for rejecting an applicant. Ask your HR and/or legal staff to provide an appropriate and sensitive method for turning down unqualified applicants. Whenever possible, work with an applicant to help him/her qualify.

2.2 Training Mentors

Is training mentors really necessary? Several studies found overwhelming evidence that **training is essential to achieving quality mentoring.** Recommended training topics include:

- ➢ Orientation to mentoring (e.g., definition, roles, responsibilities, program policies and processes).
- ➢ Communication (the single most important skill for mentoring success; see Appendix C-1).
- ➢ Being an effective role model (and why it's so important in mentoring).
- ➢ Interpersonal skills, such as rapport and trust building, delivering corrective feedback, what to do when corrective feedback doesn't resolve the situation, and conflict resolution.
- ➢ Determining when to "cut your losses" with a mentee.
- ➢ Understanding your audience (see Appendix C-2).
- ➢ Basic learning theory (see Appendix C-3).
- ➢ Demonstrating the use of academics in the workplace.
- ➢ Other fundamental knowledge topics contained in Appendix C.

Although some off-the-shelf training programs for mentors exist, customized training is far more effective. Determine the learning topics and time frames necessary for meeting your program's needs, then seek the expertise of your in-house training personnel and/or a training consultant. To help you decide what your mentors need to learn, the remainder of Section 2.2 describes some important training content found in successful mentoring programs across the nation.

Mentor's Role
A mentor serves as the **lead trainer** for a mentee. **Advocacy** (e.g., being concerned with the best interests of the mentee) is an equally important mentor role. As an advocate, a mentor will continually guide mentees through the formal and informal networks in the organization, share experiences in the job market to provide knowledge about career options and the work world in general, encourage mentees to attend mentee support groups, and seek professional help from a lead mentor or school psychologist for mentees if a family or other crisis comes to a mentor's attention. Companies should discourage mentors from playing counselor or parental roles, which are inappropriate in the context of a worksite mentoring relationship. Instead, mentors should be instructed to treat mentees as **co-workers**.

Interpersonal Skills
The *Mentoring Resource Guide* (Workforce Opportunities Resource Consortium, July 1996, p. 8) provides an excellent "picture" of the interpersonal skills that a worksite mentor should exhibit. A mentor should:

- Identify the mentee's talents, strengths, and assets.
- Help an individual to develop his or her own vision for the future.
- Give recognition for effort or improvement—no matter how slight.
- Show appreciation for contributions and demonstrate confidence and faith in the mentee.
- Value the mentee no matter how he or she performs.
- Find and point out positive aspects of behavior.
- Suggest small steps in new or difficult tasks.
- Have reasonable expectations.
- Help the mentee use mistakes as learning experiences.

Patience Tips
Patience is the **second most important skill** required for mentoring. Veteran mentors suggest:

- ✓ Go slowly at first.
- ✓ Stop frequently to make sure the mentee is keeping up.
- ✓ Insist that your mentee interrupt you if you go too fast.
- ✓ Expect to repeat yourself sometimes.
- ✓ Make suggestions instead of demanding or giving orders.

Mentoring Stages
Your mentors need to learn that their mentoring relationships will go through four predictable stages:

1. **Establishing rapport and trust**. Make a conscious effort to get acquainted. Exchange autobiographies prior to the first meeting and take time for breakfast or coffee to start the mentee's first day. Build trust by living out your responsibility to provide guidance and protect your mentee's interests from the start. Ways to do this include providing information (e.g., parking, facilities locations) and introducing the mentee to others (e.g., your supervisor, key workers with whom the mentee will train).

2. **Confirming expectations**. By the mentee's first day, expectations should already be in place through the training plan and program guidelines. Review these and any manuals or handbooks to confirm understanding. Be open to any changes, within program parameters. Establish further rapport and trust by acknowledging that you won't know the answer to every question and commit to guide the mentee in finding the answer.

3. **Implementing the training plan**. Over the course of the WSLE, complete learning activities, provide feedback, conduct checks and make revisions, and complete evaluations. Section 3 provides substantial guidelines for implementation and evaluation.

4. **Achieving closure**. Redefine your relationship with your mentee at the end of the mentoring process. Depending on the program, mentees may become coworkers (now or in the future) or e-mail acquaintances, or you may simply end the relationship. Usually, large age differences exist between you and your mentees. In addition, worksite mentoring is a professional situation. Thus, you are not likely to form lasting relationships with mentees.

Be sure that your mentor training program helps your mentors learn to recognize these stages and lets them practice making smooth transitions through them.

Train mentors to look for and recognize any relationship problems during the first two stages. The lead mentor should monitor relationships during these stages too. If a personality conflict or other problem exists, make a rematch quickly to avoid frustration. Model tact and other conflict management skills so that **no one feels blamed**. In fact, the rematch should be handled in a way that allows the mentor and mentee to remain friendly.

Preparing for Mentee Questions

Mentees are gathering information during a WSLE. They often bring a list of questions or use forms. Because they want to learn, they will be asking questions spontaneously too. Mentors need to be prepared to **expect and respond to mentee questions**.

The lead mentor should obtain from the partner liaison copies of forms that mentees will use to complete their training. Give copies to mentors and instruct them to think about appropriate answers. If making copies is impractical, compile from the partner's documents a sample list of questions mentees might want to discuss. Some typical mentee questions include:

- What is an average work day like for you?
- Name the two most important qualities or skills that a person must possess to be successful in your field.
- Which aspects of your job do you like the least?
- Have you used what you learned in high school on the job?
- What education is required for someone in your position?
- Can you describe some related jobs in your field?
- Did you always know what you wanted to do for a career?
- What is the salary range for someone in your position?

(Metropolitan Transit Authority, Career Development & Training Center, 1996, p. 19.)

Note: Mentor training is available from The Ohio State University, Center on Training and Education for Employment. Contact information can be found on the back cover. The University of Toledo's *Mentor Handbook, A School-to-Work Approach* (see Appendix A) also provides good tools for a comprehensive mentor training program.

2.3 Ongoing Training and Support

It's easy to neglect these activities in the face of everyday workplace demands, even though they are one of the "must" conditions listed in the Quality Mentoring Checklist, p. 6. Relatively little time is required for ongoing training and support, yet **these activities can have a significant impact on the long-term quality of your program.** Therefore, be sure to establish systems for ongoing training and support in your program maintenance plans.

Ongoing Training

Mentors need ongoing training to sharpen their skills. Some companies provide an annual day-long workshop during which mentors practice their skills through case studies (e.g., mentors critique the way a mentee was trained), role plays, and presentations. Other programs provide an hour of practice or new learning as part of regular mentor support meetings. The best way to learn something is to teach it, so **encourage experienced mentors to conduct both new mentor training and follow-up workshops.** In addition, remind mentors to use their orientation and training manuals for continued learning.

Support Mechanisms

Successful mentoring programs provide a combination of support mechanisms for mentors. Because support activities help a company **maximize its ROI** by ensuring ongoing quality in WSLEs and by further strengthening their workers' skills. The most common set of support mechanisms is described below.

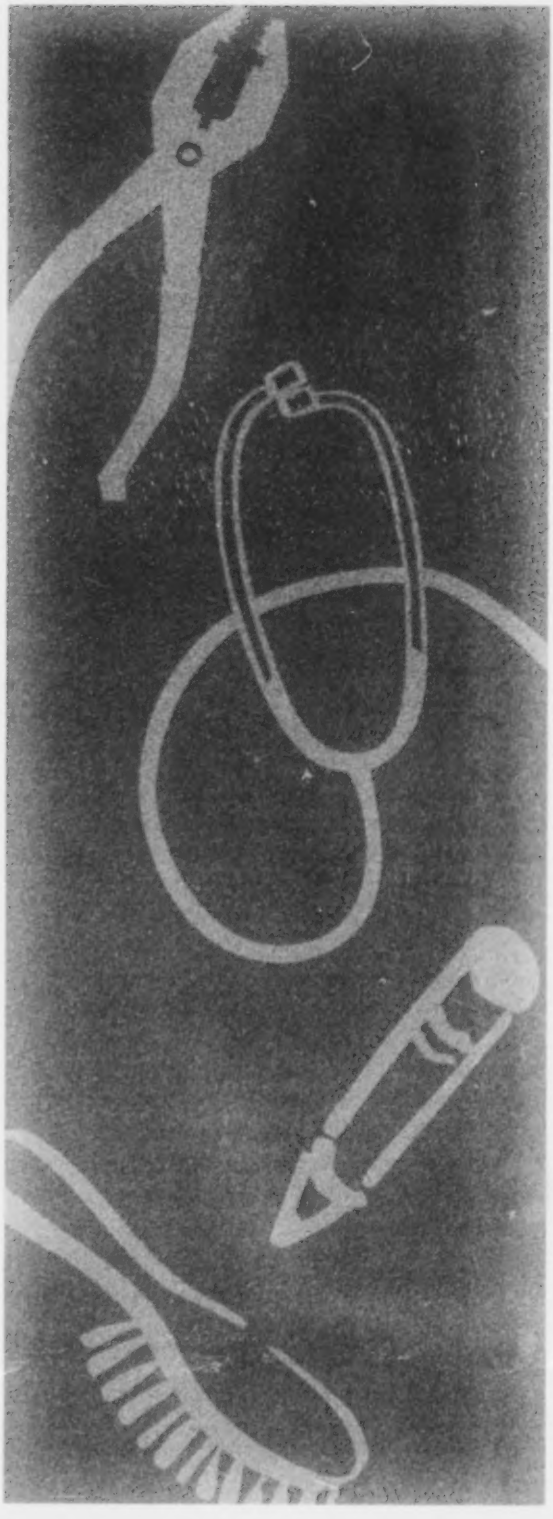
Team orientation. Invite all of the people who are working together to help the mentee succeed to a WSLE kick-off event. For example, a Westerville Schools WSL program (Ohio) hosts a breakfast meeting for parents, students, teachers, and coordinators (school and business). They experience about 75% turnout, the highest of all programs researched.

Support groups. Regular meetings should be scheduled for mentors to discuss concerns, compare notes, and seek new ideas. Many companies provide these as a part of mini-workshops for ongoing training. Be sure the school/agency partner provides a similar support group for mentees, such as a weekly meeting with veteran mentees and an adult advisor (e.g., guidance counselor, principal—not the partner liaison). Such support groups keep problems from escalating by providing regular opportunities to vent frustrations and get sound guidance for handling problem situations.

Lead mentor/partner liaison. An important part of these program leaders' jobs is to provide one-to-one coaching to mentors and mentees, respectively. As the program grows, veteran mentors and experienced teachers can also coach.

Written reminders. In orientation materials and training classes, remind all participants of the available support networks. Mentors can seek assistance from the planning team, supervisors, the lead mentor, other mentors, key staff members, and the mentors' support group. Mentees can request help from teachers, the school psychologist/guidance counselor, the partner liaison, and the mentees' support group.

Regular newsletter coverage. Provide encouragement and recognition by highlighting mentoring events and achievements in company newsletters. Larger companies can make use of department newsletters, as well. Be sure to include profiles and feature stories. They serve as a reminder that real people are involved in mentoring and help make it a credible activity for employee involvement.



Notes

Section 3: Planning and Implementing Quality WSLEs

Plan and Implement Quality Mentorships

Once your program management system and trained mentors are in place, you're ready to develop and implement training plans for your WSLEs. Through trial and error, veterans identified four basic training plan elements that, when implemented, result in quality worksite learning:

- A WSLE must be driven by a **written plan**, including evaluation.
- Learning goals and activities should focus on **broad, transferable skills**.
- Learning activities should include **project- based learning,** explained in Appendix C-3.
- **Challenges** must be written into training plans.

Section 3 incorporates these elements and provides guidelines for using them.

Providing challenges can be tricky, but challenges are crucial to holding the interest of the majority of mentees (middle and high school students). Seek support from training personnel and/or teachers to ensure that challenges are matched to a mentee's readiness for growth. Here's a helpful benchmark: too much challenge results in frustration, panic, and feelings of failure; too little is demotivating.

3.1 An Efficient, Manageable Method for Writing Training Plans

Who should prepare mentee training plans? The responsible party varies; be sure to negotiate the **training plan development process** that works best for your program with your partner liaison *in advance*. The planning process explained in Sections 3.1 and 3.2 is designed for companies functioning at the highest level of mentoring responsibility—mentors develop their mentees' training plans. However, the information is organized so that you can easily skip any steps that don't apply to your training plan development process.

Having mentors develop training plans may sound like a daunting responsibility. Veteran mentoring companies reduce it to an efficient, manageable task by using **standard WSLE planning documents**. These produce maximum ROI because they drive high-quality results. For example, mentors can use standard worksheets and lists of ideas (help sheets) to write training plans rather than create them from scratch, saving time and ensuring consistency.

Creating Standard WSLE Planning Documents

The lead mentor should seek input from department managers and supervisors to compile a set of standard WSLE planning documents for mentors to use in developing training plans. These coworkers should be asked to submit:

- ✓ Job descriptions, job performance standards, and procedure protocols that apply to specific departments.
- ✓ A list of sample learning activities (from easy to complex) for each department/area.
- ✓ A list of ways that academics are used in specific tasks.
- ✓ Case studies to use when confidentiality, safety, or other concerns limit hands-on experiences, or to evaluate mentee learning.
- ✓ Complex projects that include several learning tasks (project-based learning).
- ✓ Department-specific concerns (e.g., safety equipment required, high voltage areas, limits on customer contact).

The lead mentor uses this raw data from departments to create training plan worksheets, learning activity samples, and other help sheets. Some companies allow employees from each department to work one-to-one with the lead mentor to create such documents. Whatever method you use, **a team approach** to preparing standard WSLE planning documents **builds commitment and ownership, provides high-quality training tools, and enhances workers' skills**.

Start with working drafts of these standard documents and improve them based on your experiences with each group of mentees. Once the forms are working well, update them once or twice a year. This process provides a good quality assurance mechanism and frees workers from trying to get them perfect the first time.

Larger companies can further simplify the WSLE planning process by creating **department-specific training plans**. One hospital-based mentoring program follows this model. The school coordinator and hospital staff worked together to develop standardized learning plans that described each department's function, listed learning goals for each department, and detailed activities that would help mentees reach the goals. Learning activities included assisting technical and professional staff and observing department procedures. Mentees rotated through departments, spending an appropriate block of time in each (Goldberger S., R. Kazis and M. K. O'Flanagan, January 1994).

Worksheets

Training plan worksheets are the most important standard documents you will develop for WSLEs because they keep the focus on achieving the learning goals and they guide mentors smoothly and efficiently through the training plan development process. This guidebook uses sample training plan worksheets to demonstrate its training plan development process (see pp. 27-28, 30-31, and 33-34). You can adapt these forms for use in your program by inserting your program data (e.g., *program* goals, *group* activities) in place of the sample data.

Help Sheets

Worksheets provide a structured process for mentors to follow. **Help Sheets** give them content ideas. Two sample help sheets follow. Mentors can use them and those created specifically for your program to plan quality WSLE learning activities.

Sample Learning Activities Help Sheet

Experienced mentors have developed this benchmark for writing learning activities: "If you provide meaningful hands-on learning (OJT), you'll achieve high-quality training." So create as many opportunities for *meaningful* hands-on learning as possible. Here are some examples:

- Create a learning activity in which the mentee will encounter a procedural (not technical or job-specific) problem and must use resources in the work environment to solve it.

- Write the WSLE training plan according to mentee's current skills levels, with appropriate challenges throughout. Plan to increase or decrease task difficulty, as needed, during weekly informal discussions.

- Plan tasks that allow mentees to complete business-related forms common to your company—computer-based, if available. Examples include thank you letters, purchase orders, inventory forms, memos, and reports.

- Allow mentees to complete tasks that require gathering information and passing it on accurately (e.g., a team meeting).

Sample Real-World Learning Activities

The following learning activities have been completed successfully by mentees. Tasks are organized by industry. Mentors/trainers explained and demonstrated each activity before the mentees performed them.

Construction/Trades

- Work with a remodeling team; calculate replacement materials, e.g., the amount of tile needed to replace a floor
- Conduct air quality and lead sampling
- Help an architect bid on a job and/or construct a scale model

Financial Services, Travel, and Office Administration

- Prepare mortgage data for input on a computer
- Calculate amounts of mandatory reserve on an annual statement
- Process invoices for payment
- Write company newsletter article
- Draft some actual work from a Dictaphone
- Use a sample travel destination to plan a trip

Food Service

- Practice setting tables
- Serve as host/hostess, practicing relevant communication skills
- Measure/weigh ingredients for a feed product (agricultural job)*

  *Mentors should explain the importance of accuracy and tie activity to mathematics.
- Practice decorating a cake, then decorate some items for sale

Health Care

- Observe as a hospital worker explains to a patient the purpose of a pulse-eximetry study, then perform this noninvasive procedure on the patient
- Perform an electrocardiogram on a patient
- Prepare and conduct lab work in a pathology lab (e.g., obtain and centrifuge specimens, prepare staining solutions, enter results in computer)
- Interview patients to collect histories
- Check patients' vital signs
- Practice dental procedures (e.g., cleaning, flossing) on a denture model

Law Enforcement

- Learn the purposes of fingerprinting; fingerprint an employee
- Learn and practice standard traffic control signals; practice directing traffic with coworkers in a parking lot
- Assist with completing police paperwork (e.g., tickets, reports)
- Attend a panel discussion in which officers describe standard procedures for common police work (e.g., investigating a hit-and-run accident, giving a speeding ticket, finding a lost child) and the steps required to complete such work; practice police work on active, anonymous cases

Manufacturing and Printing

- Calculate the cost of a printing job with the use of a computer estimating system
- Read and interpret electronic schematics and electrical diagrams
- Calculate and set proper speeds and feeds for a lathe
- Perform optical microscopy, including preparing samples for defect analysis and photomicrography
- Prepare traffic signal permit drawings

Teaching

- Perform the functions of student teaching, as well as playground, hall, and lunchroom duty
- Tutor
- Read a story to the class
- Grade papers

Broad, Transferable Skills (suitable for most companies)

- Conduct critical quality check measurements*

  *Mentors should explain that releasing a product that is even 1/2" out of standard can result in fines/death.
- Practice troubleshooting
- Reconcile accounts payable
- Learn about teamwork by observing team meetings and training classes, and by role-playing conflict resolution

(Adapted from Goldberger S., R. Kazis and M. K. O'Flanagan, January 1994, with additions from Gallipolis City School District programs.)

Ask one or more former mentees to develop a list of potential learning activities that they completed or would have found helpful.

Standard Learning Goals

Discussion continues about specifically what mentees need to learn. But standard (common) learning goals are **critical to an efficient, manageable training plan development process.** Increasingly, businesses and schools/agencies are finding agreement within the SCANS competencies model (see the summary below). In addition, our participating experts' list of skills desired from WSLEs was consistent with the SCANS list. For these reasons, the *Worksite Mentoring Guidebook's* training plan development process and worksheets are built around the SCANS model. To ensure efficient use, only the summary data appears on the worksheets. However, to benefit fully from this guidebook's planning process, we strongly urge users (e.g., planning team members, lead mentor, partner liaison, mentors, mentees) to study the SCANS definitions found in Appendix D.

SCANS Workplace Know-How

The know-how identified by SCANS is made up of five competencies and a three-part foundation of skills and personal qualities that are needed for solid job performance. These are:

Workplace Competencies. Effective workers can productively use:

- **Resources**—they know how to allocate time, money, materials, space, and staff.
- **Interpersonal skills**—they can work on teams, teach others, serve customers, lead, negotiate, and work well with people from culturally diverse backgrounds.
- **Information**—they can acquire and evaluate data, organize and maintain files, interpret and communicate, and use computers to process information.
- **Systems**—they understand social, organizational, and technological systems; they can monitor and correct performance; and they can design or improve systems.
- **Technology**—they can select equipment and tools, apply technology to specific tasks, and maintain and troubleshoot equipment.

Foundation Skills. Competent workers in the high-performance workplace need:

- **Basic skills**—reading, writing, arithmetic and mathematics, speaking, and listening.
- **Thinking skills**—the ability to learn, to reason, to think creatively, to make decisions, and to solve problems.
- **Personal qualities**—individual responsibility, self-esteem and self-management, sociability, and integrity.

(Secretary's Commission on Achieving Necessary Skills, April 1992, p. xiv.)

3.2 Four Steps to QUALITY Worksite Training Plans

The *Worksite Mentoring Guidebook* provides a training plan development process designed to **deliver high-quality learning experiences with a limited amount of planning time**. If your company completes the planning tasks outlined in Sections 1, 2, and 3.1, creating WSLE training plans will be a relatively simple process because all *program* goals and activities, as well as *group* activities, will be standard items on the training plan worksheets. Mentors will handle only mentee-specific or *individual* goals and activities, following these four steps:

1. Study your audience.
2. Choose *individual* learning goals.
3. Plan *individual* learning activities.
4. Schedule *individual* learning activities.

Step 1: Study your audience.

In training, mentors should have gained some general knowledge about their audience (see Appendix C-2). To write a training plan, however, mentors need to gain insights into their individual mentees. If, as recommended, the mentee selection process mirrors the selection process for mentors explained in Section 2, mentors will have excellent resources—application, interview results, written statement of reasons for choosing this mentoring program—for getting to know their mentees. Mentors also need information about mentees' current skill levels to help them provide appropriate challenges. To avoid legal problems concerning confidentiality, be sure mentees provide their own skill level data (e.g., report cards, testing information) to mentors.

Step 2: Choose individual learning goals.

Companies should give mentors a standard worksheet for writing learning goals. *Program* learning goals should be listed on the worksheet already. Mentors then use the audience knowledge from Step 1 and standard program "help sheets" to choose appropriate *individual* goals. Even more assistance is provided by some mentoring companies. They ask mentees and/or teachers to generate a list of learning goals or give them a standard menu of possible learning goals from which to select.

The most practical way to explain Step 2 is to **walk through it**. A sample Learning Goals Worksheet can be found on pp. 27-28. It contains sample *program* learning goals from participating experts. Review the sample worksheet as though you are a mentor who has received a mentee assignment and must prepare a training plan. Note that each *program* goal and *individual* goal referenced in the instructions is listed on the worksheet. Practice using the form by adding more *individual* goals that might fit your company's program. We added examples of *individual* goals (handwritten) to get you started.

Remember that the worksheets designed for this guidebook use SCANS skills and competencies to standardize learning goals. Thus, this learning goals worksheet helps users translate most learning goals into common, measurable SCANS goals.

Learning Goals Worksheet

Instructions

1. Review the following *program* learning goals. These are already listed on the worksheet.
   A. Mentees will recognize and list at least 12 specific job tasks that require the use of SCANS Foundation Skills to successfully complete them. Mentees will list each skill and the level required.
   B. Mentees will name at least three jobs in the company that pay $50,000 per year or more and do not require a 4-year college degree. Mentees will also list SCANS Workplace Competencies and Foundation Skills required to apply for each job.
   C. Mentees will complete at least five personal learning goals, in addition to those established by the program.
   D. Mentees will evaluate the results of pursuing their personal learning goals in daily journals and an exit evaluation. Daily journals will include SCANS-specific assessments (e.g., Which competencies and skills were studied and how well were they performed?) as well as personal reflections.
   E. Mentees will organize the elements listed in learning goals A-D and the results of any additional items from individual WSL training plans into a professional portfolio that is suitable for use in job and college application processes.

2. Use the tools given to create a list of *individual* learning goals.

3. For each goal, circle or highlight the competencies and skills that will best equip the mentee to meet the goal. Then write an abbreviated version of the goal in the second column beside the chosen competency/skill. Example: A mentee wants to learn how to work as a member of a team. Circle the Interpersonal skills category because team participant is a competency listed in that category. Then write "work in team" in the second column beside Interpersonal skills. (This example is illustrated on the worksheet for you.)

4. Prioritize your choices. Number them either 1, 2, 3, or 4 in the third column, using the following key:

   #1: Competencies/skills required for both program and individual learning goals and/or goals that require or can use project-based learning
   #2: Broad, transferable competencies/skills
   #3: Broad, transferable competencies/skills considered low priority by either the mentee or the mentor
   #4: Competencies/skills that are technical or company-specific

If a goal is listed in more than one category (many will be), prioritize it in the first category only.

Learning Goals Worksheet

Competency/Skill (Circle or highlight)	Learning Goals [Write in appropriate box(es)]	Priority (See key in instructions)
Resources Allocates time, money, materials, space, staff	Program Goal E Study budget planning	#1 #1
Interpersonal skills Works on teams, teaches others, serves customers, leads, negotiates, works well with people from culturally diverse backgrounds	Work in team	#2
Information Acquires and evaluates data, organizes and maintains files, interprets and communicates, uses computers	Program Goals A, B, D Use computer in actual work situation	#2 #2
Systems Understands social, organizational, and technological systems; monitors and corrects performance; and designs or improves systems	Program Goal E	
Technology Selects equipment and tools, applies technology to specific tasks, maintains and troubleshoots equipment		
Basic skills Reading, writing, mathematics, speaking, listening	Program Goals A, B, D, E	
Thinking skills Ability to learn, reason, think creatively, make decisions, solve problems	Program Goals A, B, D, E Practice solving real workplace problems	#1
Personal qualities Individual responsibility, self-esteem, self-management, sociability, integrity	Program Goals C, D, E	#2 (Goal C)

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Step 3: Plan individual learning activities.

Planning learning activities also begins with a standard program worksheet. *Program* learning activities should be a permanent part of the worksheet. Thus, the mentor's job is to plan learning activities for the *individual* goals. Help sheets and similar standard WSLE planning documents can significantly reduce the time needed to complete this step.

Review the sample Learning Activities Worksheet located on pp. 30-31. Notice that each of the *program* goals listed on the Learning *Goals* Worksheet (pp. 27-28) can be found in the first column of the Learning *Activities* Worksheet. These goals are listed in priority order. One or more learning activities are listed in the Mentor and/or Company columns for each goal.

Learning activities can fall under either or both of the columns labeled *Mentor* and *Company*. Mentors place learning activities that they will personally implement in the Mentor column and activities to be implemented by others, such as items outside a mentor's area of expertise, in the Company column. Multiple learning activities for the same goal may fall under *both* columns as illustrated by Program Goal E on the sample worksheet, p. 30. After the training plan is approved, either the lead mentor or the preparing mentor arranges for workers who possess the necessary expertise to handle each item listed in the Company column.

Mentors must consider how to manage WSLE time as they write learning activities. They must **keep a running total** of the time needed to complete each learning activity because often there are too many learning goals to complete during a WSLE. The prioritizing performed in Step 2 helps mentors handle this problem. They can plan learning activities for as many of the goals as possible and be sure that priority #1 and #2 items are handled first. The time needed for *program* activities and *group* activities (e.g., orientations, panel discussions, tours) must be deducted from the WSLE time allotment also. Here's an example of how to manage WSLE time allotment when planning learning activities. WSLEs in XYZ Company run for 8 weeks, 10 hours per week, making XYZ mentorships a total of 80 hours long. *Program* and *group* activities require 10 hours, leaving 70 hours to complete the *individual* learning activities. After planning activities for all of the #1 priority items, and 3 of the #2 items, the running total shows 80 hours. The mentor stops planning activities and omits some #2 and #3 priority learning goals from the training plan for lack of time.

Practice using the Learning Activities Worksheet. Review the learning goals that you added to the Goals Worksheet during Step 2 and add them to the first column of the Learning Activities Worksheet. Then plan learning activities for each goal and write them in the appropriate columns. Estimate completion times for each activity. We added examples of *individual* learning activities (handwritten) to get you started.

Even experienced trainers tend to underestimate the amount of time required to complete a learning activity. Compensate for this tendency by doubling time estimates.

Note: Refer to the fundamental knowledge in Section 2.2 and Appendix C-3 for guidance and ideas when writing learning activities. The Sample Learning Activity Help Sheet on p. 22 and the Sample Real World Learning Activities list on pp. 23-24 are also good resources for writing learning activities.

Learning Activities Worksheet

Instructions

1. Using your Learning Goals Worksheet, circle or highlight the learning goals that you want to combine into one learning activity. Use different colors for clarity. (Combined goals are called a "goal set.")
2. List each goal or goal set in the left column of the Learning Activities Worksheet, listing #1 priority items first.
3. Review any help sheets provided by the lead mentor for learning task ideas. Use your own expertise as well. Then choose and/or write learning activities for each goal or goal set, placing them in the appropriate column—"Mentor" for those activities you will implement; "Company" for those activities to be implemented by others. Place a check mark beside each goal or goal set as you finish it.
4. As you write each learning activity, estimate the time required for completion and keep a running total. Stop planning learning activities if you run out of WSLE time before you run out of goals. Remember to deduct 11.5 hours for group and program learning activities from the available WSLE time.
5. Review the results with your lead mentor.

Learning Goals	Learning Activities		Time Estimate	
	Mentor	Company	Hours	Running Total
Program Goal E	Review instructions for portfolio Monitor portfolio progress	Lead mentor conducts mock interview	2 1	
Study budgeting	Review program budget plan, design Mentee practices with a budget case study		1 2	
Solve problems	Help mentee identify a problem Demonstrate steps for solving it Mentor as mentee solves another one	Help mentee identify a problem Demonstrate steps for solving it Mentor as mentee solves another one	.5 1 2	

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Learning Activities Worksheet
Page 2

Learning Goals	Learning Activities		Time Estimate	
	Mentor	Company	Hours	Running Total
Work in team	Attend daily team meetings Participate in game			
Program Goals A,B	Monitor progress on Goals A, B	Provide panel discussion, systems tour	2.5	
Program Goal D	Review daily journal, give feedback	Provide exit evaluation	3	
Use computer at work		Create and edit computer document data		
Program Goal C	Use personal learning goals in training plan and review with mentee Check progress with personal goals weekly	Collect personal learning goals from the mentee and distribute to mentor	2	

Step 4: Schedule individual learning activities.

Schedule in this context requires two actions:

1. **Negotiate training time** with supervisors and trainers.
2. Organize the learning activities into an hourly/daily **calendar format**.

The style of your training schedule form will depend upon program logistics, like when and how long mentees will be at your workplace. The *Worksite Mentoring Guidebook's* sample schedule on pp. 33-34 follows XYZ Company's logistics (p. 29) and uses some of the data in the Learning Activities Worksheet (pp. 30 and 31) to illustrate Step 4.

Whatever schedule style you choose, make sure it lists standard *group* and *program* learning activities as a **permanent part of the form**. Then the mentor can focus on scheduling *individual* activities.

While negotiating training times with other departments/experts, prepare them to host the mentee—brief the trainer about the audience, goals, and activities; provide worksheet copies; and make evaluation arrangements. After the training schedule is finalized, provide a copy to each trainer, with the relevant time highlighted.

Remember that a training plan should **remain flexible.** Teach mentors to check their training plans regularly and revise them based on the changing needs of the company and/or mentee. For example, a mentor may discover that a mentee has an aptitude more suited to jobs in another department. This mentor would simply make time in the schedule for the mentee to shadow a coworker and practice real-world tasks that would use this aptitude.

Sample Training Schedule

Instructions

1. Insert individual learning activities from the worksheet. First insert those activities contained in the Company column, based on the times negotiated with the respective departments. Then insert the mentor learning activities. Place a check mark beside each activity after it is transferred.
2. Add department-level orientations to the plan. These should be conducted the first time the mentee arrives at the department for training. (Note: Mentees should receive a general tour, jobs overview, safety/tools presentation, and a warm welcome.)
3. Schedule regular, informal discussions with the mentee to check the training plan and learning progress.

Sample Training Schedule

Time	Tuesday	Wednesday	Thursday
1:00-2:00 p.m.	Program Orientation	Company systems tour	Help mentor identify a problem Demonstrate steps for solving it
2:00-3:00 p.m.	Program Orientation	Review mentee's student plan Explain resource guide to mentee	Teach demonstration Let mentee solve another problem
3:00-4:00 p.m.	Review personal learning goals Tour mentor department Host mentee at team meeting Review portfolio instructions	Mentor completes case study Each case study reading, project worked on Host mentee at team meeting	Let mentee solve another problem Monitor progress, guide as needed
4:00-5:00 p.m.	Mentee departs at 4:00 p.m.	Mentee departs at 4:00 p.m.	Complete exit evaluations Review key points Have mentee complete exit evaluation, have mentee complete exit

Time	Tuesday	Wednesday	Thursday
1:00-2:00 p.m.	ABC department orientation Help mentee identify problem	XYZ department orientation Help mentee identify problem	Mock interview with lead mentor
2:00-3:00 p.m.	Demonstrate steps for solving it	Demonstrate steps for solving it	Locate and print computerized report data
3:00-4:00 p.m.	Let mentee solve another problem Monitor progress, guide as needed	Let mentee solve another problem Monitor progress, guide as needed	Debriefing
4:00-5:00 p.m.	Mentee departs at 4:00 p.m.	Mentee departs at 4:00 p.m.	Complete exit evaluations Exit interview with mentor

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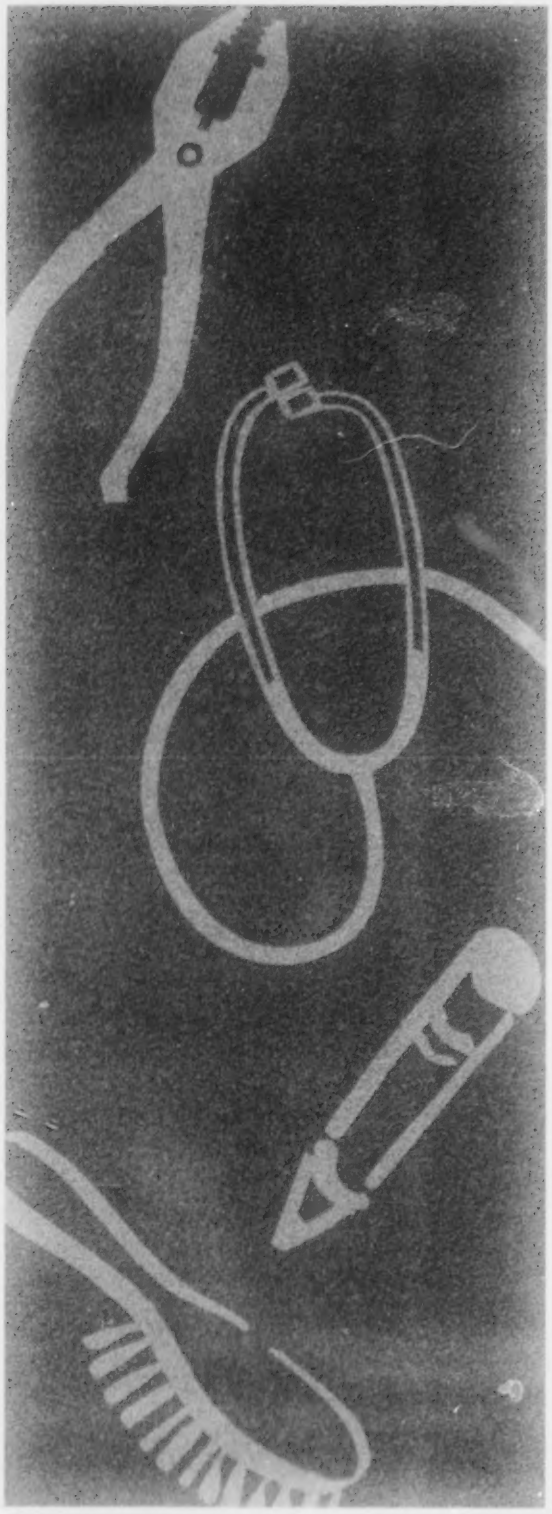


Notes

Plan and Implement Quality Mentorships

3.3 Implementing Worksite Learning Experiences

If companies invest in the planning efforts outlined in this guidebook for developing quality WSLEs, implementation will be as simple as following the training plan and remaining flexible. Some **implementation tips from the veterans are explained in this section.**

Participating experts caution that many mentees arrive at work sites unprepared for the learning experience. Be sure to address preparation issues with your partner liaison. For example, will the mentee be dressed appropriately for the mentee interview process? for work? Will he/she come prepared to ask questions and learn? A solid mentee selection process can help you clearly specify your workplace expectations and weed out mentees who are unwilling to meet them.

Tips for conducting training:
Both mentors and trainers should become proficient in the teaching skills described.

Four-Phase Instructional Model for Teaching a New Skill

1. *Preparation.* Help the mentee understand why the skill he/she is about to learn is important, e.g., link it to existing skills, give examples of use.
2. *Presentation.* Explain sequentially the steps for completing the new skill/task. Slowly demonstrate it, if possible. Alternatively, use props to activate several senses—sight (e.g., flip chart or board), hearing (e.g., metaphors, stories), touch (e.g., drawings, photographs, actual parts/tools).
3. *Application.* Supervise mentee's performance of the skill. Coach, provide feedback, and redirect as needed. More learning occurs in this step than the others because it's hands-on.
4. *Evaluation.* Use your program's tools to evaluate and record the mentee's progress, after he/she can perform the new skill successfully several times.

(Adapted from Metropolitan Transit Authority, 1996.)

Tips for reinforcing the learning:

- Provide frequent feedback, being careful to give more encouragement than correction.
- Encourage questions.
- Encourage note taking.
- Repeat instructions, confirm mentee understanding, clarify any misunderstandings.
- Discuss the learning frequently, encouraging mentee reflection.

Tips for group activities:

The most important group event may be the orientation. Consider these orientation guidelines:

- Create a welcoming environment (e.g., welcome sign, mentor/mentee photos, refreshments).
- Review safety, expectations, rules.
- Review the tasks and responsibilities of the WSLE.
- Remind both mentors and mentees to participate in the program's support activities.
- Provide time for mentors and mentees to establish rapport.
- Provide an icebreaker activity (e.g., a password game) that helps mentors and mentees relax and get to know one another.
- Give a short plant tour, pointing out important facilities such as lockers, cafeteria, and break areas.
- Explain company background (e.g., mission, organizational chart, company video).
- Limit orientation to two hours, allowing at least 30 minutes of that time for activities that pair the mentor with his/her mentee.

Be sure to use name tags at all times during the WSLE! Mentees practice better self-management if their names are visible.

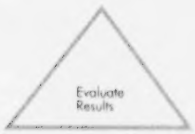
Other **group learning activities** include:

Panel discussions. Staff from key functional areas compare business and academic systems, reviewing the differences inherent in the work world. For example, pay and promotions replace grades, and attendance and punctuality count at work. Other panels feature high school graduates employed in jobs that pay over $50,000 and employees working in nontraditional jobs.

Systems. Mentors guide mentees through the total company system, from raw material/client "in," through all the work stages, to product/client "out." For best results, let the mentee observe each stage of the process in action (i.e., "go to the spot") and provide interactive learning opportunities.

HR perspective. Demonstrate the realities of work with learning activities such as mock interviews, "what if" discussions, and a termination case study.

Debriefing. This is a must activity at the end of a quality WSLE. In a typical debriefing session, mentees make a short presentation of what they learned followed by a brief, honest question and answer session, completion of formal evaluations and exit interviews, and a celebration!



3.4 Evaluating the Results

Work-based learning is well-suited for evaluation because:

- ✓ It focuses on hands-on learning, which is easier to measure than knowledge gain.
- ✓ Both program plans and training plans are designed to contain very specific, well-defined learning goals, which are easy to measure.
- ✓ Workplace minds tend to think functionally, e.g., does it work or doesn't it?

Section 1.2, Step 7 explained the importance of building an evaluation system into the overall program plan and listed the elements required. Section 3.4 provides a menu of evaluation methods that can yield data to help you assess both program effectiveness and individual learning.

School partners often use learning evaluation documents, so check with your liaison first. Vocational education programs are especially good sources for worksite learning evaluations. In addition, The Mentoring Resource Guide (Workforce Opportunities Resource Consortium, July 1996), provides business-oriented guidance for conducting evaluations. Companies seeking to develop a high-quality evaluation strategy will find valuable tools in this book.

Evaluation Menu

Experienced mentoring companies employ two to three methods that compliment one another to obtain a comprehensive, accurate assessment. No matter which method(s) you use, be sure to produce valid, reliable data.

A. In general, companies are conducting **outcome evaluations**, which measure the impact of the program on both the mentee and mentor. This guidebook's methods for developing program goals and individual goals yield strong measures for outcome evaluations—provided your mentors keep **daily records** of the learning activity.

B. The partner liaison often assigns **daily journals.** If they aren't assigned by the partner, make them a *program* goal in your WSLE training plan. As mentees create these regular assessment tools, the journal writing process helps them develop

very important workplace skills like writing, reflective thought, drawing conclusions, self-monitoring and discipline, and analysis. Be sure the journal assignment includes writing about how WSL activities are changing the mentee's self-perception and his/her view of the work world.

C. **Portfolio assessment** is becoming popular with employers. Like journals, this evaluation method doubles as a teaching tool because it requires mentees to review and assess their own work and demonstrate their learning.

D. A **practical assessment system** for WSLEs was created by Far West Labs. This group is listed in Appendix A.

E. In **partner-based evaluations**, a teacher assesses a mentee's participation in a WSLE. Grades may be given for each learning goal or for individual competencies/skills. Or one grade may be given for the entire WSLE. In addition, partners can monitor school records (e.g., grades, attendance) for one or two years after the WSLE to assess its impact.

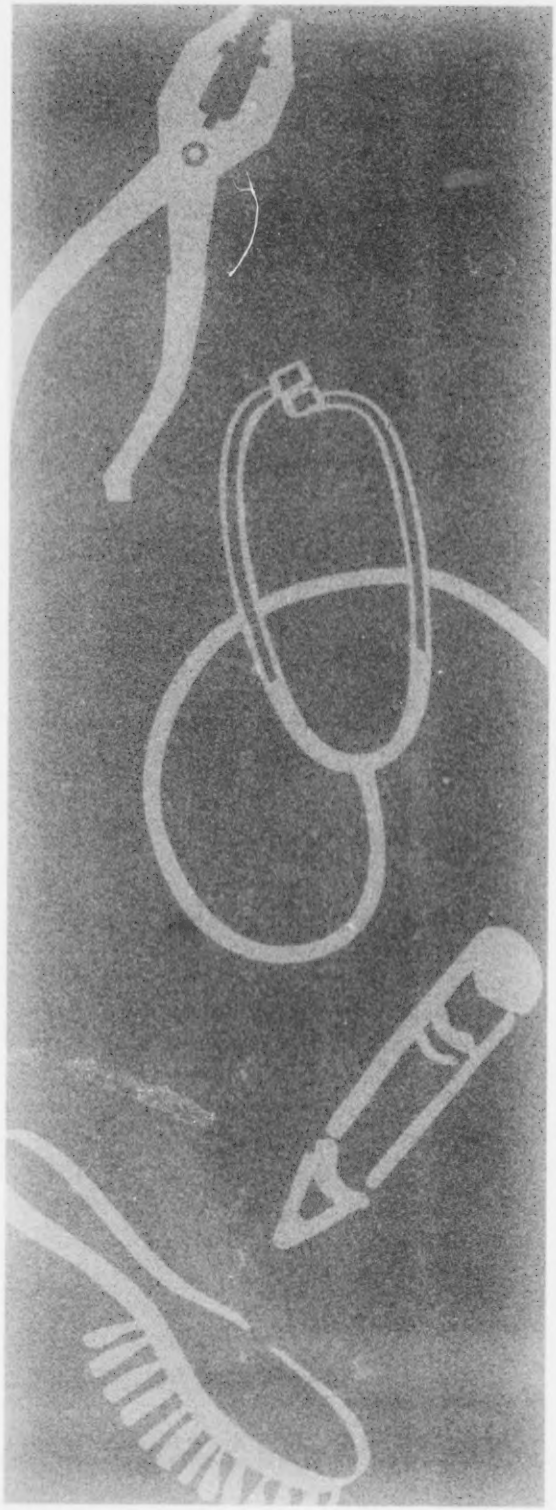
F. **Formal questionnaires** are useful at the end of a WSLE (see samples in Section 4). Be sure the form you choose assesses attendance, punctuality, appearance, concentration, and preparedness for the WSLE, in addition to progress made with the established learning goals.

Give mentors one or more standard recording forms to help them log learning activity results, notes from informal evaluation meetings, and daily reflections of WSLE progress. These forms can be used for monitoring progress, writing reports, and evaluating the quality of both the WSLE and the mentoring program. A sample log can be found in Section 4.

The Final Step in the Evaluation Process

Mentees are gone. Reports are filed. However, the evaluation process is incomplete without one final, critically important, step—**feedback**. Several audiences need feedback.

- Mentors need improvement data—learning results, evaluation comments, and skill assessments.
- Partner liaisons need improvement data—evaluation comments and experiential feedback.
- Public relations staff need information for submitting press releases.
- All participants need recognition, such as feature stories in company newsletters.



Notes

Section 4: Forms for Worksite Learning

Worksite mentoring forms tend to be very program-specific. Therefore, Section 4 offers **one example** for each of the most common forms used in mentoring programs. You can adapt them to design documents that meet the needs of your specific situation. Forms may be copied, too, pursuant to the conditions outlined on the copyright page.

Remember to check what forms your program partner uses first. Also, they may be willing to create any needed forms for you.

Form	Purpose
• Worksite Mentor Application (pp. 41-42)	Mentor selection tool
• Mentor Qualifications Checklist (p. 44)	Mentor selection tool–confidential coworker assessment of an applicant's mentoring aptitude
• Mentee Application (pp. 45-46)	Mentee selection tool
• Parent/Guardian Agreement (p. 47)	Parental/Guardian permission and support *Note: Partner liaison is responsible for administering this form; check to ensure parental support is encouraged.*
• WSLE Agreement (p. 48)	Defines program boundaries and establishes responsibility for honoring them
• Learning Goals Worksheet (pp. 49-50)	Tool for developing learning goals
• Learning Activities Worksheet (pp. 51-52)	Tool for developing learning activities
• Worksite Learning Log (p. 53)	Tool for recording mentee progress, professional reflections and similar data
• Student Evaluation of the Internship Experience* (p. 54)	Mentee evaluation tool *Note: Evaluates the mentoring program, but not mentee learning. Veterans recommend that mentees complete the Mentee Learning Assessment to self-assess their learning results.*
• Mentee Learning Assessment (p. 55)	Mentor and/or trainer evaluation tool for recording mentees' progress toward developing skills targeted in the WSLE
• Employer Evaluation Report* (p. 56)	Mentor evaluation tool for assessing mentees' SCANS Foundation Skills (e.g., attitude, punctuality) and the WSL program in general.

*These forms are used in a South Carolina internship program. They can be adapted for use in a mentoring program.

Additional forms can be found in both of the companion books (see Appendix B) and the resources listed in Appendix A.

Worksite Mentor Application

Name _____ Telephone _____

Department _____ E-mail address _____

Please list below your current job title and major job responsibilities:

Please attach a current resume **or** complete the next two sections.

Education:
Include high school, college, technical, and career/professional training.

School, City, State	Date Completed	Major Areas of Study

Professional Experience:

Company, City, State	Dates Employed	Major Duties	Reason for Leaving

Mentor Application
Page 2

Answer the following questions on a separate sheet and attach it.

1. Why do you want to mentor?

2. Why should the company select you for the mentoring program? Give three reasons.

3. Have you had any training or experience in mentoring or related roles (e.g., training, coaching)? If yes, please list and briefly describe.

4. If you become a worksite mentor, what types of learning experiences and activities would you want to share with your mentees?

Please attach copies of your last three performance evaluations.

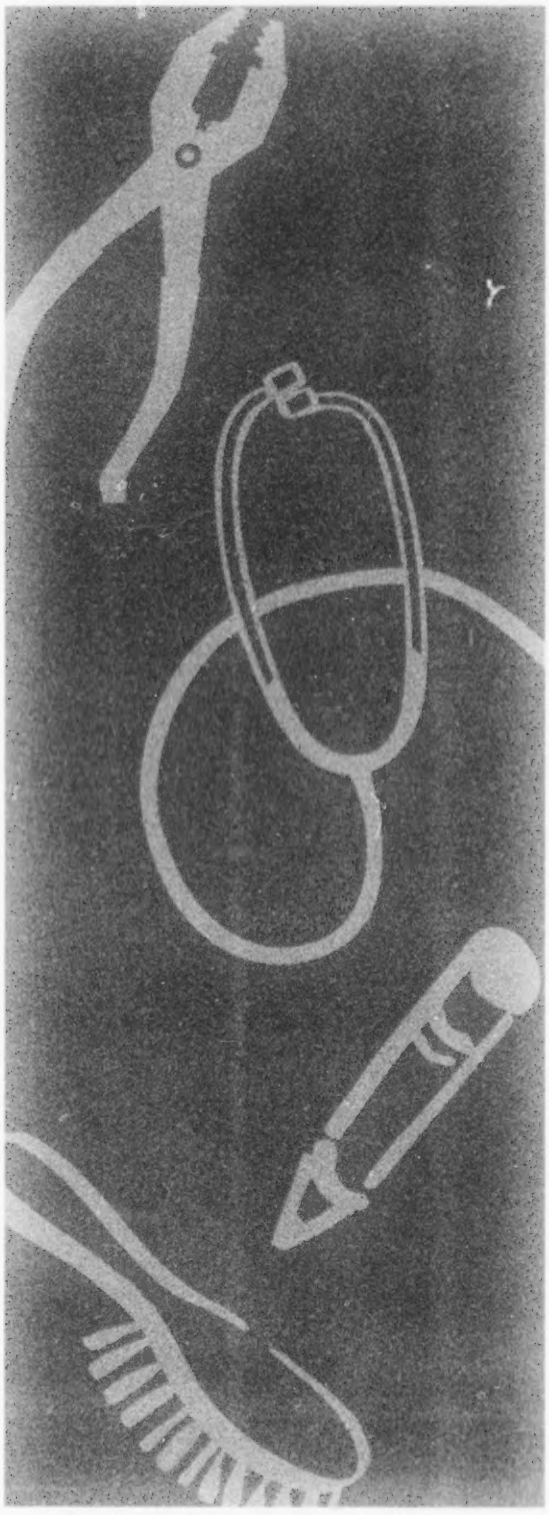
If selected for this worksite mentor program, I agree to:

- Host my mentees in a high-quality fashion, as described in the program's training classes.
- Acquaint my mentee with my area of expertise.
- Provide guidance and hands-on experience.
- Follow program guidelines for recording, reporting, and assessment in a timely manner.

_____ _____

Applicant's signature Date

(Adapted from Workforce Opportunities Resource Consortium, July 1996.)



Notes

Mentor Qualifications Checklist

Instructions: This form must be completed by the applicant and three colleagues—all anonymously. Rank each statement by putting an X in the appropriate column, as defined:

1 = Superior
2 = Proficient
3 = Adequate
4 = Poor

Applicant's Name: _____

	1	2	3	4
Working with others				
Listening				
Showing respect				
Sensitivity to needs and feelings				
Sharing what I've learned				
Flexibility				
Patience and tolerance				
Competence in field of expertise				
Commitment to ongoing learning				
Ability to explain things in a variety of ways				

Mentee Application for Paticipation in Worksite Learning

Instructions: Please complete the required information in your best handwriting (in ink) or on a typewriter. Leave no blank spaces. Put a short line in any space that does not apply and "see attached" for any answers provided on a separate sheet. Sign and return the form to _____. Submission of this form does not guarantee acceptance. Your application is the first of many steps in the worksite learning applicant selection process.

Applicant's Name _____ Telephone _____

Birthdate _____ Grade Level (if student) ___

Please attach a current resume or complete the next two sections.

Education:
Include high school, college, technical, and career/professional training.

School, City, State	Date Completed	Major Areas of Study

Professional Experience:

Company, City, State	Dates Employed	Major Duties	Reason for Leaving

Mentee Application
Page 2

Answer the following questions on a separate sheet and attach it.

1. What are your current career goals (e.g., field, occupation)?

2. What education is required to obtain these goals?

3. Why do you want to participate in worksite learning?

4. Why should an employer select you? (Give three reasons.)

If selected to participate in worksite learning, I agree to:

- Put forth my best effort in all aspects of the learning experience.
- Complete the entire worksite learning experience.
- Come to every worksite learning event and session prepared to learn.
- Follow employer guidelines for dress, punctuality, safety, quality, productivity, and teamwork.

Applicant's signature

Date

To be completed by employer or agency/school office.
Please provide data for the previous six years.

	Current Year	Year 2	Year 3	Year 4	Year 5	Year 6
Days Absent						
Times Tardy						
Cumulative GPA or Performance Evaluation						

(Adapted from the NWREL and JFF, 1998.)

Parent/Guardian Agreement

We are pleased to inform you that_____ has been selected for participation in our worksite learning program. Parent/Guardian support has a very important impact on a worksite learning experience's effectiveness; therefore, we are asking you to support your learner by:

- Attending parent meetings.
- Participating in the development of learning goals.
- Informing worksite learning staff members about any concerns relative to learner's participation.
- Helping the learner keep all worksite learning commitments.
- Encouraging the learner throughout the entire learning experience.
- Discussing the attached Worksite Learning Agreement with the learner and helping him/her recognize the commitment required.
- Signing the agreement along with the learner, if all parties can agree to its contents.

Your signature below indicates your permission for_____to paticipate in the worksite learning program and your agreement to support your learner in the ways listed.

_____ _____

Parent/Guardian Name Parent/Guardian Signature

_____ _____

Address Date

_____

_____

Telephone

(Adapted from Workforce Opportunities Resource Consortium, July 1996.)

Worksite Learning Experience Agreement

To meet the goals of this worksite learning program, mentees must recognize and assume the responsibilities listed below.

1. I am under the jurisdiction of the school/agency during each phase of my worksite learning experience.
2. I will perform my duties and study assignments to the best of my ability.
3. I will maintain the workplace appearance standards established by my mentoring company (e.g. grooming, hygiene, uniform).
4. I will be punctual.
5. I will notify my employer as soon as possible if I cannot report to the workplace due to illness or an emergency situation.
6. I will respect the importance of regular attendance in the workplace and give employer representatives the right to discuss my attendance with my school/agency liaison.
7. I will complete the entire worksite learning experience.
8. I give both the mentoring company and school/agency permission to discuss my performance in this program.
9. I will complete all required forms in a timely manner.
10. I understand that dishonesty in any form during the worksite learning experience may be grounds for dismissal from the program.

I fully understand the statements listed above and agree to cooperate in carrying them out.

Mentee

Parent/Guardian

School/Agency Liaison

Mentoring Company Liaison

(Adapted from Billings, J., J. Pearson, J. Wood, B. Crossman, July 1994.)

Learning Goals Worksheet

Instructions

1. Review the following *program* learning goals. These are already included on the worksheet.
   A.

   B.

   C.

   D.

   E.

2. Use the tools given to create a list of *individual* learning goals.

3. For each goal, circle or highlight the competencies and skills that will best equip the mentee to meet the goal. Then write an abbreviated version of the goal in the second column beside the chosen competency/skill. Example: A mentee wants to learn how to work as a member of a team. Circle the Interpersonal skills category because team participant is a competency listed in that category. Then write "work in team" in the second column beside Interpersonal skills. (This example is illustrated on the worksheet for you.)

4. Prioritize your choices. Number them either 1, 2, 3, or 4 in the third column, using the following key:

   - **#1**: Competencies/skills required for both program and individual learning goals and/or goals that require or can use project-based learning
   - **#2**: Broad, transferable competencies/skills
   - **#3**: Broad, transferable competencies/skills considered low priority by either the mentee or the mentor
   - **#4**: Competencies/skills that are technical or company-specific

If a goal is listed in more than one category (many will be), prioritize it in the first category only.

Learning Goals Worksheet

Competency/Skill (Circle or highlight)	Learning Goals [Write in appropriate box(es)]	Priority (See key in instructions)
Resources Allocates time, money, materials, space, staff		
Interpersonal skills Works on teams, teaches others, serves customers, leads, negotiates, works well with people from culturally diverse backrounds	Work in team	
Information Acquires and evaluates data, organizes and maintains files, interprets and communicates, uses computers		
Systems Understands social, organizational, and technological systems; monitors and corrects performance; and designs or improves systems		
Technology Selects equipment and tools, applies technology to specific tasks, maintains and troubleshoots equipment		
Basic skills Reading, writing, mathematics, speaking, listening		
Thinking skills Ability to learn, reason, think creatively, make decisions, solve problems		
Personal qualities Individual responsibility, self-esteem, self-management, sociability, integrity		

Learning Activities Worksheet

Instructions:

1. Using your Learning Goals Worksheet, circle or highlight the learning goals that you want to combine into one learning activity. Use different colors for clarity. (Combined goals are called a "goal set.")
2. List each goal or goal set in the left column of the Learning Activities Worksheet, listing #1 priority items first.
3. Review any help sheets provided by the lead mentor for learning task ideas. Use your own expertise as well. Then choose and/or write learning activities for each goal or goal set, placing them in the appropriate column—"Mentor" for those activities you will implement; "Company" for those activities to be implemented by others. Place a check mark beside each goal or goal set as you finish it.
4. As you write each learning activity, estimate the time required for completion and keep a running total. Stop planning learning activities if you run out of WSLE time before you run out of goals. Remember to deduct 11.5 hours for group and program learning activities from the available WSLE time.
5. Review the results with your lead mentor.

Sample

Learning Goal	Learning Activities		Time Estimate	
	Mentor	Company	Hours	Running Total
Program Goal E	Review instructions for portfolio Monitor portfolio progress	Lead mentor conducts mock interview	2 1	
Study Budgeting	Review [illegible] project [illegible] Mentor practice with a budget case study		1 2	
Solve Problems	Help mentee identify a problem Demonstrate steps for solving it Mentor as mentee solves another one	Help mentee identify a problem Demonstrate steps for solving it Mentor as mentee solves another one	.5 1 2	

Learning Activities Worksheet

Learning Goal	Learning Activities		Time Estimate	
	Mentor	Company	Hours	Running Total

Worksite Learning Log

Mentor: _____ Date: _____

Mentee: _____

Date	Event (e.g., learning activity, meeting)	Performance Assessment (e.g., satisfactory, needs improvement)	Observations/Conclusions

STUDENT EVALUATION OF THE INTERNSHIP EXPERIENCE

Student Name: _____

Occupation Internship: _____

Internship Site: _____

Place a check in the space beside each rating which best describes your internship experience.

1. How would you rate the internship experience?

   Excellent_____ Good_____ Average_____ Fair_____ Poor_____

2. Did the experience meet your expectations of the occupation?

   Yes_____ No_____

3. Do you feel the supervisor exposed you to a variety of responsibilities related to the occupation you were experiencing?

   Yes_____ No_____

4. Did the experience change your mind about your career plans?

   Yes_____ No_____

5. What is the best thing that has happened to you in this program?

   _____

   _____

   _____

6. How can the program be improved?

   _____

   _____

   _____

Comments: _____

_____

_____

Nielson, B. S., N. C. Dunlap and A. L. Matthews (1995).
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Mentee Learning Assessment

Mentor: _____ Date: _____

Mentee: _____

Instructions: List the SCANS competencies/skills targeted in this WSLE from the Learning Activities Worksheet. Based on your observations and your log entries, assess the mentee's skill level. Record it in the appropriate time interval box.

4 = Skilled 3 = Moderate Skills 2 = Limited Skills 1 = Unsuccessful

SCANS Competency/Skill	Pre-WSLE	Mid-WSLE	End of WSLE
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

Assessment Completed by: _____ Date: _____

Note: Mentee should self-assess too.
Comments:

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(Adapted from Nielsen, B. S., N. C. Dunlap, A. L. Matthews, 1995.)

EMPLOYER EVALUATION REPORT FOR INTERNSHIP

Student : _____

Internship Supervisor: _____

Internship Site: _____

Evaluate the student' s performance using the following scale. Place a check in the space beside each rating which best describes the student's performance during the internship experience.

	Excellent	Good	Fair	Poor
Attitude				
Punctuality				
Cooperation				
Enthusiasm/Interest				
Courtesy				
Proper attire				
Willingness to accept guidance				
Willingness to conform to rules and regulations				
How would you rate the Internship Program?				

How can the program be improved?

_____

_____

_____

Comments: _____

_____

_____

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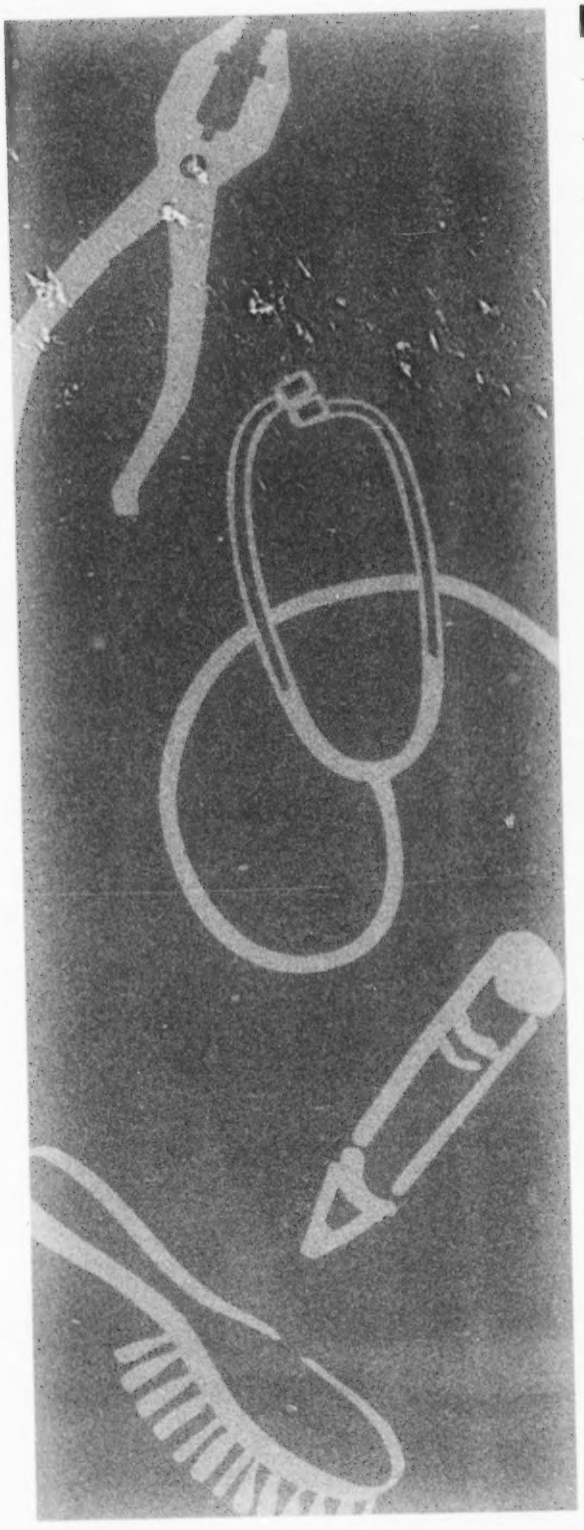

Notes

Appendix A: Resources[1]

Books

- Northwest Regional Educational Laboratory (NWREL) and Jobs for the Future (JFF) (1996), *Connections: Linking Work and Learning, Employer Recruitment & Orientation Guide**.

  These agencies partnered to create a series of worksite learning guidebooks. Other guides cover job shadowing and career exploration. These guides are practical and easy to follow. Although they are written for educators and students, businesses can glean much valuable information from them, too. Contact information for the NWREL and JFF is listed in the Agencies section of this appendix.

- Billings, J., J. Pearson, J. Wood, B. Crossman (July 1994). *Coordinator's Guide for Work-Based Learning. Tacoma, WA: NWCCC.*

  This guidebook was written for school coordinators who are responsible for managing work-based learning.

- Evans, T. W. (1992). *Mentors, Making a Difference in Our Public Schools. Princeton, NJ: Peterson's Guides.*

- Goldberger, S., R. Kazis, M. K. O'Flanagan (January 1994). *Learning Through Work: Designing and Implementing Quality Worksite Learning for High School Students.* New York, NY: Manpower Demonstration Research Corporation.*

  Much creative energy and resources are being focused on improving school-to-work transitions. This book is intended to help practitioners and policy makers channel their resources into designing and implementing quality programs and systems. Researchers for the book made a special effort to interview several employer representatives at each site, from CEO to supervisors to workers.

- Grubb, W. Norton (ed.) (1995). *Education Through Occupations in American High Schools, Vol. II, The Challenge of Implementing Curriculum Integration. New York and London: Teachers College Press.*

  Grubb and his authors address the challenge of eliminating the separation of vocational and academic education.

- Instructional Materials Laboratory (1996). *Work-Based Mentors: Connecting Students to the Workplace. Columbia, MO: University of Missouri-Columbia.*

  This book focuses on securing student internships that pay wages.

- Mahlman, Robert (June 1995). *Administrative Technology Management, Mentor Handbook. Columbus, OH: Columbus State Community College.*

  This mentor handbook is designed as an information resource for business and industry mentors involved in a School-to-Work partnership.

- Metropolitan Transit Authority, *Career Development & Training Center (1996), Mentor Handbook. Los Angeles, CA.*

  This handbook contains solid background knowledge about mentoring and good insights for dealing with at-risk populations. You can reach the Career Development & Training Center at (213) 922-5251.

- National Employer Leadership Council, *The Employer Participation Model: Connecting Learning & Earning.* Washington, DC, 1996.*

  A practical, 16-page overview of educational initiatives. This booklet, developed by companies such as American Express, Kodak,

[1] All references cited in the *Worksite Mentoring Guidebook* are listed in this appendix.

* Books that would be most helpful to a business audience.

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Ford, and Siemens, helps businesses manage the numerous and varied requests for involvement in education initiatives. It would be quite helpful to a company that is considering education-related community involvement activities. Contact the NELC at 1001 Connecticut Avenue, NW, Suite 310, Washington, DC 20036. Telephone 1-800-360-NELC or e-mail NELC at nelc@nelc.org or http://www.nelc.org/

- Nielson, B. S., N. C. Dunlap and A. L. Matthews (1995). *South Carolina School-to-Work Implementation Guide for Work-based Learning. Columbia, SC: The Carolina Department of Education.*

- Piper, J.W. (1996). *Mentor Handbook: A School-to-Work Approach. The University of Toledo.*

  This handbook is a synopsis of mentoring basics that uses the government school-to-work (STW) model. Some Ohio joint vocational institutions and high schools utilize it. Although it is not written in "business language," it can be a useful tool for anyone using the "official" STW model as a baseline for their mentoring program.

- Piper, J.W. (1996). *Mentor Training: A School-to-Work Approach. The University of Toledo.*

  This larger manual is the companion to the mentor handbook cited above, and serves as a guidebook for formal training of mentors. It, too, is based on the government school-to-work model.

- The Secretary's Commission on Achieving Necessary Skills (1991). *What Work Requires of Schools. Washington, DC: U.S. Department of Labor.*

  Workplace competencies and foundation skills required for effective job performance are defined in this book.

- The Secretary's Commission on Achieving Necessary Skills (April, 1992). *Learning a Living: A Blueprint for High Performance, a SCANS Report for America 2000. Washington, DC: U.S. Department of Labor.* This book represents an update to the first SCANS report (1991).

- Workforce Opportunities Resource Consortium (July, 1996). *Mentoring Resource Guide.**

  This guide provides a clear, "nuts & bolts" presentation of what it takes to establish and run a quality mentoring program.

Agencies

- Far West Laboratory for Educational Research and Development, *730 Harrison Street, San Francisco, CA 94107, (415) 565-3000.*

  The Career Technical Assessment Project (CTAP) developed and implemented an evaluation system that relies on student performance of authentic work-related tasks and projects, assessing both discipline-specific and work-readiness skills.

- Illinois State Curriculum Center, *University of Illinois at Springfield, (800) 252-4822.*

  The Center houses a wide assortment of mentoring and related titles. Call for a listing. Staff are very helpful!

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* Books that would be most helpful to a business audience

Appendix A: Resources[1]

- Institute for Women in Trades, Technology & Science (IWITTS).

  The Institute offers training for employers and unions in:
  - Assessing Students for Work-based Learning Assignments
  - Preventing Isolation and Paternalistic Treatment of Women
  - Support Strategies for Work-based Mentoring
  - Providing Appropriate Bathroom/Changing Facilities/Personal Protective Equipment
  - Preventing Sexualizing of the Workplace/Harassment

  A training video covering these topics is now available. A train-the-trainer manual comes with the video. IWITTS is certified as a national technical assistance provider by the National School-to-Work Office; implementation states may use their technical assistance line of credit of $125,000 for these training activities. Contact Donna Milgram, Executive Director, 3010 Wisconsin Avenue NW, #E10, Washington, D.C. 20016, (202) 686-7275.

- Jobs for the Future *(JFF), One Boudoin Square, 11th Floor, Boston, MA 02114. Phone: 617/742-5995; fax: 617/742-5767; Internet address: info@jff.org.*

  JFF is a national, non-profit organization that works at national, state, and local levels to help prepare all citizens for effective transitions between learning and work.

- Northwest Regional Educational Laboratory (NWREL), *101 SW Main Street, Suite 500, Portland, OR 97204. Phone: 503/275-9500 or 800/547-6339; Fax 503/275-0443.*

  NWREL provides consulting services, workshops, institutes, and long-term technical assistance in developing and maintaining school-to-work systems.

- Center on Education and Training for Employment (CETE), The Ohio State University, *1900 Kenny Road, Columbus, OH 43210. Phone: 800/848-4815; Fax: 614/292-1260; Internet address: www.cete.org.*

  CETE provides consulting services, project coordination, training, and technical assistance related to workforce development, including:
  - Worksite learning
  - Curriculum development
  - Professional development
  - Assessment
  - Guidance and career exploration

Your local and state **School-to-Work** offices and **Departments of Education** offer a variety of workplace learning resources. **The American Vocational Association (AVA)** and state vocational associations have significant experience in the field of worksite learning.

Vocational educators offer the best experience in mentoring because they are the veterans in the school side of your partnerships. They have been quietly doing worksite learning for years!

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Appendix B: Companion Book Resources

This guidebook is the third in a series that supports the integration of school and work-based learning. The first two books in the series are:

- ✓ *Helping Teachers Connect Academics to the Workplace: An Implementation Guide for Teacher Worksite Externships.* This book helps teachers link school and work.

- ✓ *Helping Students Connect Academics to the Workplace: An Implementation Guide for Student Worksite Learning Experiences.* This book helps schools develop worksite learning programs so that students can make connections between school and work.

Both books are filled with resources for worksite learning. Although they are designed for mentee and school partner use, businesses may find them helpful, as well. Their contents are similar, but each is customized for its audience. *Helping Students'* contents are listed on pp. 61-62.

School partners may have copies of these books, or contact the Vocational Instructional Materials Laboratory at The Ohio State University, (614) 292-8300 or (800) 848-4815 for more information.

CONTENTS

Rationale for the Integration of Academic and Vocational Education

About This Guide

Definitions

Benefits

Principles for Successful School-Business Partnerships

Steps to Developing a Student Worksite Learning Experience (SWLE) Program

Step 1: Select and Determine the Roles and Responsibilities of an Administrative Liaison

Step 2: Select and Determine the Roles and Responsibilities of Teacher Team Members

Step 3: Determine How the SWLE Program Will Be Structured

Step 4: Assess the Status of Liability Coverage

Step 5: Design Individual Academic Observation Plans for Students

Step 6: Develop Promotional Materials

Step 7: Locate Potential Worksite Placements

Step 8: Make Initial Contact with Representatives at Potential SWLE Worksites

Step 9: Arrange for Student Placement at Worksites

Step 10: Match Students with Worksites

Step 11: Write SWLE Agreements

Step 12: Develop Written Materials
Step 13: Prepare Students for Worksite Visits
Step 14: Observe Students at Worksites
Step 15: Assess Student Attainment of SWLE Desired Outcomes
Step 16: Incorporate Worksite Learning Experiences into the Curriculum
Step 17: Evaluate the SWLE Program and Share Results
Step 18: Recognize Contributions of Worksite Representatives and Acknowledge Appreciation
Srep 19: Follow Up with Contacts at Worksites on a Regular Basis
Conclusions and Recommendations
References

APPENDICES

Appendix A: Individual Academic Observation Plans
Appendix B: SWLE Agreement
Appendix C: Communication with Parents
Introductory Letter to Parents/Guardians
Parent/Guardian Consent Form
Appendix D: Promotional Materials
Promotional Brochure
Letter of Introduction
Confirmation Letter to Worksite Mentors
Pre-SWLE Press Release
Post-SWLE Press Release
School Newsletter Article
Appendix E: Worksite Contact Sheet
Appendix F: Tools for Students
Questions That Students Might Ask Employers and Employees
Student Observation Checklist: Communications
Student Worksite Observation Sheets
SWLE Student Log

Appendix G: Evaluation of SWLE Student Performance

Student Self-Evaluation Form

Worksite Mentor's Student Performance Evaluation Form

Teacher Observation Form

Appendix H: Evaluation of the SWLE Program

Student Evaluation Forms

Worksite Mentor Evaluation Forms

Worksite Contact Person Evaluation Form

Teacher Evaluation Form

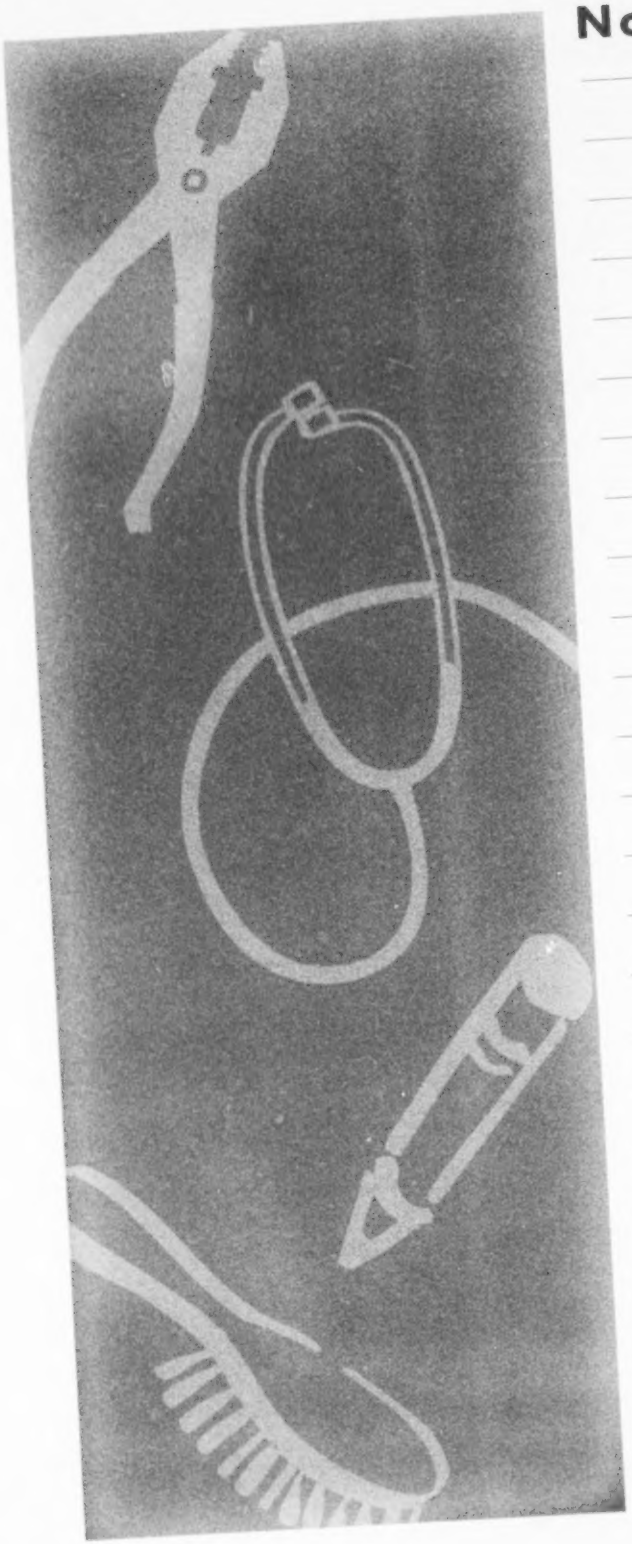
Appendix I: Recognition and Appreciation

Thank-You Letter from Students

Thank-You Letter from the Administrative Liaison

Certificate of Recognition

Appendix J: Excerpts from an OCAP



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Appendix C: Fundamentals for Quality Worksite Mentoring

Most major projects are built upon **a solid knowledge base**—the fundamentals. Quality worksite mentoring has certain basic knowledge requirements too. Appendix C outlines the fundamentals needed by most mentoring programs.

	Knowledge Area	Page
C-1	Communication Tools	66
C-2	Understanding Your Audience	69
C-3	About Learning	72
C-4	Legal Issues	73
C-5	Involving Unions	75
C-6	Equity Issues	76

Appendix C-1 Communication Tools

The participating experts unanimously agreed with the research that communication is the most important mentoring tool. This appendix addresses mentoring-related communication topics that can have the greatest impact on the success of your WSL program.

A Mentoring Communication Skill Set

Too often we operate under the false assumption that because we understand what we are saying, our listener does too. As George Bernard Shaw put it, "The problem with communication is the illusion that it has been accomplished." You must learn and practice communication skills, just as you would computer skills or the ability to speak a foreign language.

Specifically, mentors need to be adept at **active listening, questioning, reading nonverbal cues, and giving information** if they are to create a safe, welcoming, and effective learning climate. Here are some practical tips for performing these skills:

Active listening:

- Maintain eye contact.
- Don't interrupt or rush the mentee, and don't tolerate others' interruptions.
- Demonstrate that you are listening by keeping an open posture (e.g., uncross arms and legs, lean slightly toward the mentee).
- Keep an open mind by avoiding judgments and assumptions.
- Pay attention. Don't let your mind wander to what you want to say next or to some other situation.
- Encourage further discussion through clarifying statements, "what" and "how" questions, and open-ended questions (i.e, cannot be answered with a simple "yes" or "no").

Questioning:

- Stay focused on the purpose for questioning—a sincere desire to understand what the mentee is communicating or whether the mentee understood what you were explaining.
- Ask open-ended questions.
- Use the 5W and 1H method (i.e., who, what, when, why, where, and how).

Reading nonverbal cues:

- Gather information from facial expressions (e.g., smiles, frowns, wrinkled forehead).
- Watch body language (e.g., crossed arms, wringing hands, leaning toward or away from you).
- Listen to the feelings beneath the spoken words.
- Monitor eye contact (e.g, appropriately exhibited or avoided?).

Giving Information:

- Be succinct and clear.
- Ask confirming questions.
- Be sensitive to words/styles that might cause negative reactions (see Appendices C-2, C-3 and C-6 for potential problem areas).
- Use "I" statements and avoid "You" statements. "You" statements invoke a defensive reaction that hinders the receiver's ability to hear and accept the information you're giving.

(Adapted from Metropolitan Transit Authority, 1996 and the Instructional Materials Laboratory, 1996.)

Assessing a Mentor's Communication Skills

Because communication is the most important mentoring skill, determine in advance what skill level is acceptable for your program. Then assess your volunteers' skills levels. Choose a communication skill assessment tool* for inclusion in your mentor selection process. Work with volunteers that don't pass the test to raise their skills to your chosen mentor level. You'll gain more qualified and committed mentors as well as more capable employees!

* Several good assessment tools exist. Pick one that asks peers to provide anonymous input. Contact your HR staff or an HR professional association (e.g., National Society for Performance Improvement, American Society for Training and Development) for recommendations.

Caution!

Worksite mentors are the primary source of information, support, and challenge for mentees; therefore, they must take responsibility for effective communication. Unfortunately, research shows that mentors sometimes blame their mentees when communication fails. **Blaming can destroy a mentoring relationship**, so be sure to address this potential problem candidly with all parties involved in the mentoring program—including mentees. Explain that countless communication studies have shown that people are more likely to miscommunicate than to communicate clearly. Stress the importance of simply accepting this reality, refusing to place blame, and focusing on overcoming the barriers that are hindering communication.

Common Communication Barriers and Ways to Overcome Them

First, teach mentors these skills. Then instruct your mentors to provide similar learning for their mentees by example.

- ✓ Is the person listening? Sometimes people are preoccupied. A mentee may be trying to digest what you explained a few minutes before. Facial expressions and other nonverbal cues give hints about a person's listening level. Slow down and be patient, if necessary.
- ✓ How's your relationship with the mentee? If trust is high, both parties will be ready to receive. But anxious, angry, or embarrassed feelings can block listening and discussion. Again, read nonverbal cues and if you sense embarrassment, a reassuring smile or some encouraging words may break down the barriers. If this fails, take a break. Ask, "Is something on your mind/bothering you? I'd be happy to help. We can come back to this in a few minutes." Note: Be sure that your nonverbal cues say, "I sincerely want to help and I won't judge you."
- ✓ How are you feeling? If you are upset with the mentee, talk it over before moving on. When this is done appropriately, you'll teach him/her a great deal about conflict management. If you're upset with something else, tell the mentee. For example, "Sue, I'm probably going to seem a bit edgy. I've got a problem on my mind right now. Honestly, it has nothing to do with you. In fact, our training time is so important that I'm putting off solving my problem until we're finished."
- ✓ Are you talking above your mentee's head? It's very common to use workplace acronyms or technical jargon without realizing it. Give your mentee permission to stop you when you fall into this habit. If you must use technical jargon, explain each term clearly.

Behavior—the Stronger Communication Tool

As you implement methods to strengthen your mentors' communication skills, remember the timeless wisdom, **"actions speak louder than words."** Help mentors recognize that their actions are the stronger messenger, and that avoiding discrepancies between their words and their actions requires a commitment to honesty. As long as their words are truthful, their actions are guaranteed to match their words. Such integrity not only provides clear and effective delivery of the current learning content, it also gives a powerful character lesson.

Note: Additional ideas for communication training for mentors can be found in Module 4 of the *Mentor Handbook: A School-to-Work Approach* by J. W. Piper (see Appendix A).

Communication Preparations: A Worksheet for Mentors

When planning important interactions with your mentee, reflect on these key communication issues. Jot down notes in an outline form to help you stay on track during the interaction. Include the following:

1. What am I trying to achieve in this communication with my mentee? (Specify the goal, then list the information you want to convey.)

2. What's the best way to communicate effectively in this situation (in person, by telephone, in writing)?

3. What kind of response do I expect?

4. What will I do if my mentee gives an unexpected response?

5. Have I allowed enough time for my mentee to respond, ask questions, clarify?

6. What can I do to encourage him/her to respond, ask questions, clarify?

7. Am I aware of my nonverbal cues? What do I need to do to make sure my nonverbal cues are consistent with my communication agenda (item 1)?
   Note: Generally, a mentor wants to communicate support in any situation; a smile can do this best!

8. How will I ensure that this communication enhances our mentoring relationship?

Appendix C-2 Understanding Your Audience

Mentoring programs traditionally have served high school and college students. However, a growing number of programs mentor grade school and middle school students, and adults (e.g., persons with disabilities, widows with no work experience, displaced workers). Use the purpose and goals of your current program to dictate which audience your company will mentor. The following table will help you identify and categorize audience types.

*Continuum Category**	*Audience Type*	*Ages*	*Typical Academic Equivalents*
Shadowing	Children	to age 12	Grades pre-K-5
Same	Middle School or Preteens	12-15	Grades 6-9
Shadowing, Mentoring, & Internships	High School or Teens	15-18	Grades 9-12
Same	Young Adults	8-23	College, Technical School, Vocational/Social Program
Same	Adults	24 +	College, Technical School, Vocational/Social Program

* See Worksite Learning Continuum, p. 1.

If your program plans to work with more than one audience, use a separate pool of mentors for each one. The needs and styles of each group differ significantly—what works with teens may not work with children, preteens, or adults.

Mentoring Preteens and Teens

Because the vast majority of programs work with preteen and high school audiences, only characteristics for those two groups are listed. Maturity and skills levels can vary widely among suburban, urban, and rural districts; many other factors can have an impact on these levels as well. Thus, be sure to get a list of your specific audience's characteristics from your partner, then go to the spot—visit the school/social program site to meet and observe your audience.

About Preteens	About Teens
Uneasy about trying new things	Eager to make decisions
Anxious for peer group approval	May challenge authority
Eager for adult status and privileges	Desire independence, may lack discipline
Focused on present versus future	Feeling uneasy about readiness for future
May lack concentration over long periods	Testing to build own personal philosophies
Prone to generalizations and value judgements	Highly sensitive to adult reactions but may pretend indifference
Interested in socializing with nonparental adults	

Tips From Your Audience

This section contains comments from preteens/teens about what they would like from you.

"Sometimes I ask you to listen to me. When you start giving advice, you have not done what I asked. When you tell me why I shouldn't feel that way, you are trampling on my feelings. When you act to solve my problem, you have failed me, strange as that may seem. Listen! All I asked was that you not talk."

"And **I can do for myself.** I am not helpless—maybe discouraged and faltering, but not helpless. When you do something for me that I can do, and need to do, for myself, you contribute to my fear and weakness. But when you accept as a simple fact that I do feel what I feel, no matter how irrational, then I can quit trying to convince you and get about the business of facing and overcoming the feelings."

"So, please. Listen and just hear me; and if you want to talk, wait a minute for your turn, and I'll listen to you."

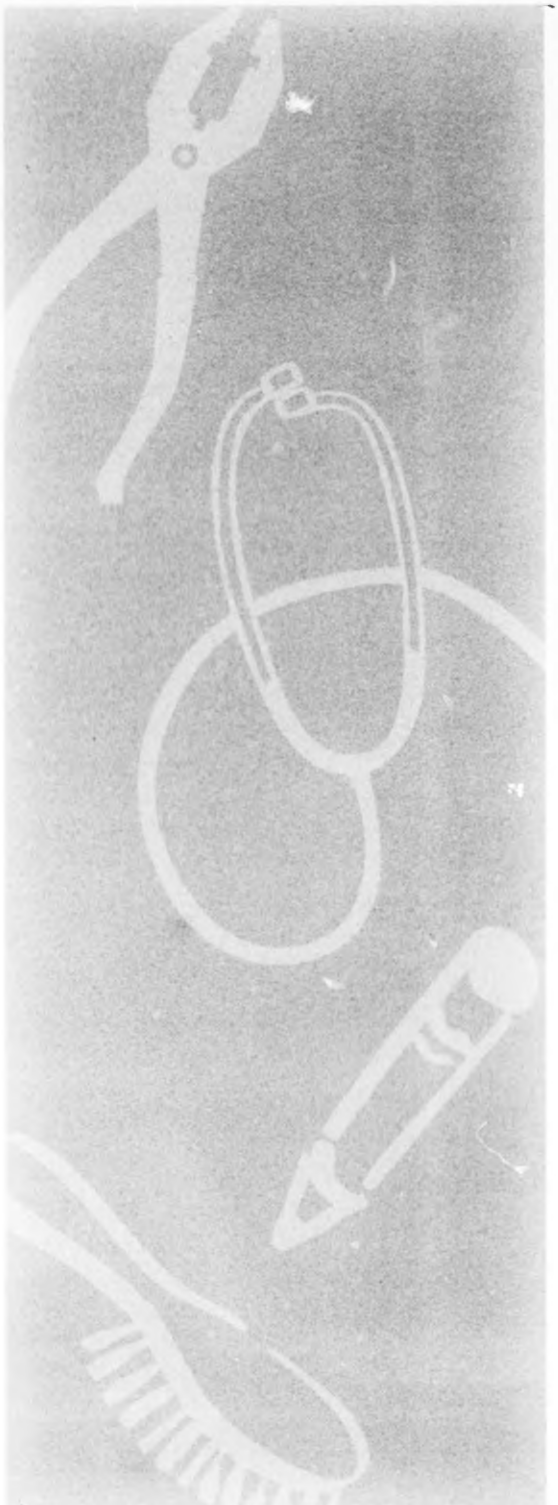
(Adapted from T. W. Evans, 1992.)

Final Thoughts on Understanding Your Audience

Remember that all learners have at least these three characteristics in common:

- ✓ All learners are leaving their comfort zone to enter your workplace. Thus, they may be shy at first. Don't mistake quiet shyness for disinterest!
- ✓ Different is not inherently better or worse. Each mentee, no matter how different he/she appears or behaves, is a valuable individual who deserves to be treated with dignity and respect.
- ✓ When learners come to a worksite, they are especially vulnerable. Mentors must combine acceptance, respect, and trust with their job knowledge to ensure a positive learning situation.

(Summarized from NWREL and JFF, 1996 and Instructional Materials Laboratory, 1996.)



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Appendix C-3 About Learning

Both research about how people learn and business training experience indicate that:

1. Most people learn best by doing.
2. Learning is most effective when skills and knowledge are deliberately linked to how they are used in completing work tasks.

Businesses are already skilled at **learning by doing** because they conduct on-the-job training for new and/or transferred employees. Thus, workers are already experienced at providing the hands-on style of training that mentoring requires. They simply need to apply that skill to developing training plans and build upon it with mentoring-specific knowledge.

Training Methods

Worksite learning should be active (i.e., hands-on, OJT). Several training methods can accomplish this goal, but most worksite mentors prefer a show-and-tell delivery method (e.g., mentor describes, then demonstrates a work task) because it's comfortable—it is the method used most often in the workplace. The show-and-tell method is a quality training method because it affects two senses—hearing and seeing. People learn better when more than one of their senses is engaged. Encourage mentors to refine their natural show-and-tell skills; however, help them to develop skills with other methods as well.

Some skills, by their nature, are easier to grasp through other delivery methods. For instance, most of us learned employability skills (e.g., punctuality, integrity, responsibility) by *observing* the accepted norms in our schools, homes, and workplaces. Thus, mentors must **train by example,** too. They must demonstrate punctuality, perfect attendance, respectful treatment of coworkers and customers, and high-quality performance.

Veterans have found that **project-based learning** provides the greatest depth of knowledge and the longest retention among the training methods used. As the name suggests, a mentee is given a project to follow from beginning to end. Such learning activities fit well at the end of the training in a functional area and are especially useful for evaluating learning results.

Appendix C-4 Legal Issues

When approached with a request for worksite learning, many businesses hesitate because of legal concerns such as **liability, confidentiality, and child labor laws**. Prudence is wise, however, the record shows that sponsors and volunteers are rarely sued (Source: Nonprofits' Risk Management and Insurance Institute). The University of Toledo's *Mentor Handbook* brings a balanced perspective to the matter, "...by bringing [mentees] into the workplace the mentor's [legal] responsibilities do not increase. The mentor must behave responsibly toward all employees." (J. W. Piper, 1996). The bottom line on legal issues is—**relax** ***and*** **be proactive**. Seek legal counsel and insurance expertise. Items to consider are described in this subsection.

Liability. Generally, liability falls into the four categories:

1. Injury to mentee at worksite—if mentees are paid for their WSLE, employer should cover mentees under the company workers' compensation policy. If the WSLE is unpaid, responsibility for coverages is negotiable. Sign a written agreement!
   Note: In general, internships are the only paid WSLE.

2. Injury to mentee during transit—liability generally rests with the party responsible for transporting.

3. Injury to patrons or employees at the worksite—generally covered by the school district/agency; however, a company can be exposed to liability if it has sole responsibility for training and/or supervising the mentees.

4. Employer property damage—covered by the business' property insurance, but it often incurs deductible charges. Negotiate payment for deductibles at the program's inception, and put it in writing.

(Adapted from Workforce Opportunities Resource Consortium, July 1996.)

Avoid the potential for liability by:

- Providing safety training for mentors.
- Adding other types of coverages to your general liability policy (e.g., volunteer or excess policies).
- Requiring signed release forms from mentees, mentors, and parents.

Confidentiality. Maintaining confidentiality can be a major concern for employers such as counselors, ministers, banks, physicians, and lawyers. However, experienced mentors report that, with training, mentees take confidentiality as seriously as the company's own employees. "It's something we can teach them, a professional attitude, really," said one trainer in an interstate bank (NWREL and JFF, 1996, Fact Sheet F).

Here are some **practical tips** for addressing confidentiality concerns:

- ✓ Help your partner **create a pre-WSLE workshop on confidentiality.** Deliver it during the student preparation portion of the mentoring program. Employees could create a video at the worksite for use in the training. Also provide copies of the documents (e.g., employee handbook, orientation packet) used to train new employees.

- ✓ As mentees go through your program's selection process, **monitor candidates' maturity level.** Some people (both students and adults) simply have not acquired the maturity necessary to respect confidentiality—a problem that training cannot resolve. When choosing mentees, use the same criteria to judge this ability that you use in selecting new employees.

- ✓ **Prepare your employees to handle any customer concerns.** They should be equipped to reassure customers that mentees are learning and being monitored, and that mentees are trained to handle confidential matters.

- ✓ Keep information obtained from the mentee confidential too. **Treat the mentee with the same respect shown to your clients.** Follow the same guidelines for breaking confidences that physicians and social workers use, e.g., if a mentee appears suicidal or confides that he/she is being abused, seek the help of your lead mentor and/or school professionals.

Child Labor Laws. The federal Fair Labor Standards Act (FLSA) and state laws *can* apply to mentoring situations. However, federal and state laws often conflict and there are many exemptions. In fact, only one rule is clear: when a conflict exists between FLSA and a state law, the more restrictive of the two applies. More important, however, is the fact that **most WSLEs are exempt from all child labor laws** because participants are not paid.

Research indicates that misperceptions abound among business people about child labor laws, resulting in unwarranted trepidation about mentoring. **Get the facts**: have your in-house or corporate counsel investigate the laws for your particular situation and state. For an introduction to the topic, order *Minor Laws of Major Importance* from the National Institute for Work and Learning in Washington, D.C.

Remember that coordinators and teachers in vocational and apprenticeship programs have managed their programs within the constraints of these legal issues for many years and would be happy to share their practical wisdom!

Appendix C-5 Involving Unions

Union members can bring very important support to your mentoring efforts. They have operated apprenticeship training for many years, so be sure to seek their practical wisdom for both program operations and training plans. Unions also provide leadership to employees; therefore, they are great conduits for sharing information and gaining interest and involvement in mentoring. To reap these benefits, **be sure to secure an influential member of your local union for your mentoring program advisory team**, whether or not your company is unionized.

The Northwest Regional Educational Laboratory, listed in Appendix A, offers these ideas for involving local unions in work-based learning:

Solicit the participation of the union steward. Because stewards function as worksite liaisons, they are well-equipped to assist in implementing and monitoring WSLEs. Recruit steward volunteers for contact persons during WSLEs. Seek stewards' ideas for recruiting mentors based on their knowledge of workers' interests in and concerns about working with mentees.

Request experiential knowledge from local union representatives. Union involvement in education reform can provide valuable insights into working with schools. Unions have a long history of working with adult learners and that experience can yield tips for motivating workers to get involved in mentoring.

Include union representatives in planning activities with the partner. Labor representatives should be included as joint partners with the mentoring company to negotiate the type and scope of WSLEs. Such involvement creates an environment of trust and respect, resulting in a sense of ownership and commitment to the program among workers. In addition, union members bring a unique perspective to work-based learning that can be helpful as partners review roles and responsibilities, goals, expectations, legal considerations, mentoring skills, and other preparations for working with mentees.

(Adapted from NWREL and JFF, 1998.)

Research indicates that the largest barrier businesses encounter when bringing a mentoring program into a union-organized environment is workers' fear of being displaced by mentees. Avoid such fears by immediately offering a **nondisplacement agreement** (e.g., a written guarantee that the mentoring program will not cause layoffs or eliminate jobs). Such action demonstrates that you have knowledge of and are concerned about union members' concerns and that you are willing to address them. For more information about union concerns and constraints on the topic of mentoring, contact the AFL-CIO public affairs department in Washington, D.C., for a copy of their official position statement, *Skill Training and School-to-Work Transition in the 1990s and Beyond*.

Appendix C-6 Equity Issues

Just as employers should strive to create equity in their workplaces, mentoring companies must also strive to create equitable WSLEs for all mentees. In both cases, **ensuring equity requires vigilance**. The following guidelines have helped successful worksite programs.

- ✓ Request help from your partner and from relevant community organizations (e.g., NAACP, unions, chambers of commerce, business women's associations), in recognizing and addressing the cultural differences inherent in the population you will be serving.

- ✓ Monitor incoming mentees for individuals from social groups that have historically received inequitable treatment (e.g., females, disabled persons, teen parents, persons of color, and persons of foreign descent). These groups may trigger subconscious biases in employees that have developed through interaction with peers, television, relatives, and popular opinion. Provide customized coaching for workers who will assist mentees from these groups to help the workers recognize and deal with biases.

- ✓ Provide awareness sessions and training for mentors and other workers who will train mentees to help eliminate biases and stereotypes.

- ✓ Include as role models in your mentor group, panels and similar work groups adults working in nontraditional roles.

- ✓ Monitor training plans and WSLEs to ensure that both male and female mentors in a similar work area provide consistent training (e.g., similar learning activities, focus on the same skills).

- ✓ Clearly state— and vigilantly implement—a policy of providing WSLEs for all mentees in the audience served by your program (see Appendix C-2), regardless of race, ethnicity, or disabilities. In addition, hold your partner accountable for supporting your efforts to serve all mentees (e.g., teachers of disabled mentees should work one-to-one with mentors; the candidate pool should be a representative sample of the total audience).

- ✓ Communicate that all company policies and procedures regarding sexual harassment and discrimination apply equally to mentees and employees. Be sure to enforce those policies.

Caution must be maintained around the typical dynamics of male/female situations. As males and females continue to break into nontraditional occupations, cross-gender mentoring is inevitable. Ongoing communication about the potential problems inherent in such situations and strict application of company sexual harassment and discrimination policies can effectively deter potential problems in this area.

Appendix D SCANS Definitions

SCANS Workplace Know-How

Workplace Competencies

Resources

Manages Time. Selects relevant, goal-related activities, ranks them in order of importance, allocates time to activities, and understands, prepares, and follows schedules.

Manages Money. Uses or prepares budgets, including making cost and revenue forecasts; keeps detailed records to track budget performance; and makes appropriate adjustments.

Manages Material and Facility Resources. Acquires, stores, and distributes materials, supplies, parts, equipment, space, or final products in order to make the best use of them.

Manages Human Resources. Assesses knowledge and skills, distributes work accordingly, evaluates performance, and provides feedback.

Interpersonal Skills

Participates as a Member of a Team. Works cooperatively with others and contributes to group efforts with ideas, suggestions, and effort.

Teaches Others. Helps others learn needed knowledge and skills.

Serves Clients/Customers. Works and communicates with clients and customers to satisfy their expectations.

Exercises Leadership. Communicates thoughts, feelings, and ideas to justify a position, encourage, persuade, convince, or otherwise motivate an individual or groups, including responsibly challenging existing procedures, policies, or authority.

Negotiates to Arrive at a Decision. Works towards an agreement that may involve exchanging specific resources or resolving divergent interests.

Works with Cultural Diversity. Works well with men and women and with people from a variety of ethnic, social, or educational backgrounds.

Information	**Acquires and Evaluates Information.** Identifies a need for data, obtains the data from existing sources or creates them, and evaluates their relevance and accuracy. **Organizes and Maintains Information.** Organizes, processes, and maintains written or computerized records and other forms of information in a systematic fashion. **Interprets and Communicates Information**. Selects and analyzes information and communicates the results to others using oral, written, graphic, pictorial, or multimedia methods. **Uses Computers to Process Information.** Employs computers to acquire, organize, analyze, and communicate information.
Systems	**Understands Systems.** Knows how social, organizational, and technological systems work and operates effectively within them. **Monitors and Corrects Performance**. Distinguishes trends, predicts impacts of actions on system operations, diagnoses deviations in the functioning of a system/organization, and takes necessary action to correct performance. **Improves and Designs Systems.** Makes suggestions to modify existing systems in order to improve the quality of products or services and develops new or alternative systems.
Technology	**Selects Technology.** Judges which sets of procedures, tools, or machines, including computers and programs, will produce the desired results. **Applies Technology to Task.** Understands the overall intents and the proper procedures for setting up and operating machines, including computers and their programming systems. **Maintains and Troubleshoots Technology.** Prevents, identifies, or solves problems in machines, computers, and other technologies.

Basic Skills

Reading. Locates, understands, and interprets written information in prose and documents—including manuals, graphs, and schedules—to perform tasks; learns from text by determining the main idea or essential message; identifies relevant details, facts, and specifications; infers or locates the meaning of unknown or technical vocabulary; and judges the accuracy, appropriateness, style, and plausibility of reports, proposals, or theories of other writers.

Writing. Communicates thoughts, ideas, information, and messages in writing; records information completely and accurately; composes and creates documents such as letters, directions, manuals, reports, proposals, graphs, and flow charts with the language, style, organization, and format appropriate to the subject matter, purpose, and audience; includes, where appropriate, supporting documentation, and attends to level of detail; and checks, edits, and revises for correct information, appropriate emphasis, form, grammar, spelling, and punctuation.

Arithmetic. Performs basic computations; uses basic numerical concepts such as whole numbers and percentage in practical situations; makes reasonable estimates of arithmetic results without a calculator; and uses tables, graphs, diagrams, and charts to obtain or convey quantitative information.

Mathematics. Approaches practical problems by choosing appropriately from a variety of mathematical techniques; uses quantitative data to construct logical explanations for real world situations; expresses mathematical ideas and concepts orally and in writing; and understands the role of chance in the occurrence and prediction of events.

Listening. Receives, attends to, interprets, and responds to verbal messages and other cues such as body language in ways that are appropriate to the purpose—for example, to comprehend, learn, critically evaluate, appreciate, or support the speaker.

Speaking. Organizes ideas and communicates oral messages appropriate to listeners and situations; participates in conversation, discussion, and group presentations; selects an appropriate medium for conveying a message; uses verbal language and other cues such as body language in a way appropriate in style, tone, and level of complexity to the audience and the occasion; speaks clearly and communicates a message; understands and responds to listener feedback; and asks questions when needed.

Thinking Skills

Creative Thinking. Generates new ideas by making nonlinear or unusual connections, changing or reshaping goals, and imagining new possibilities; and uses imagination freely, combining ideas or information in new ways, making connections between seemingly unrelated ideas, and reshaping goals in ways that reveal new possibilities.

Decision Making. Specifies goals and constraints, generates alternatives, considers risks, and evaluates and chooses best alternatives.

Problem Solving. Recognizes that a problem exists (i.e., that there is a discrepancy between what is and what should be); identifies possible reasons for the discrepancy, and devises and implements a plan of action to resolve it; and evaluates and monitors progress, revising the plan as indicated by findings.

Mental Visualization. Sees things in the mind's eye by organizing and processing symbols, pictures, graphs, objects, or other information—for example, sees a building from a blueprint, a system's operation from schematics, the flow of work activities from narrative descriptions, or tastes food from reading a recipe.

Knowing How to Learn. Recognizes and can use learning techniques to apply and adapt existing and new knowledge and skills in both familiar and changing situations; and is aware of learning tools such as personal learning styles (visual, aural, etc.), formal learning strategies (note taking or clustering items that share some characteristics), and informal learning strategies (awareness of unidentified false assumptions that may lead to faulty conclusions).

Reasoning. Discovers a rule or principle underlying the relationship between two or more objects and applies it in solving a problem—for example, uses logic to draw conclusions from available information, extracts rules or principles from a set of objects or a written text, or applies rules and principles to a new situation (or determines which conclusions are correct when given a set of facts and conclusions).

Personal Qualities

Responsibility. Exerts a high level of effort and perseverance toward goal attainment; works hard to become excellent at doing tasks by setting high standards, paying attention to details, working well even when assigned an unpleasant task, and displaying a high level of concentration; and displays high standards of attendance, punctuality, enthusiasm, vitality, and optimism in approaching and completing tasks.

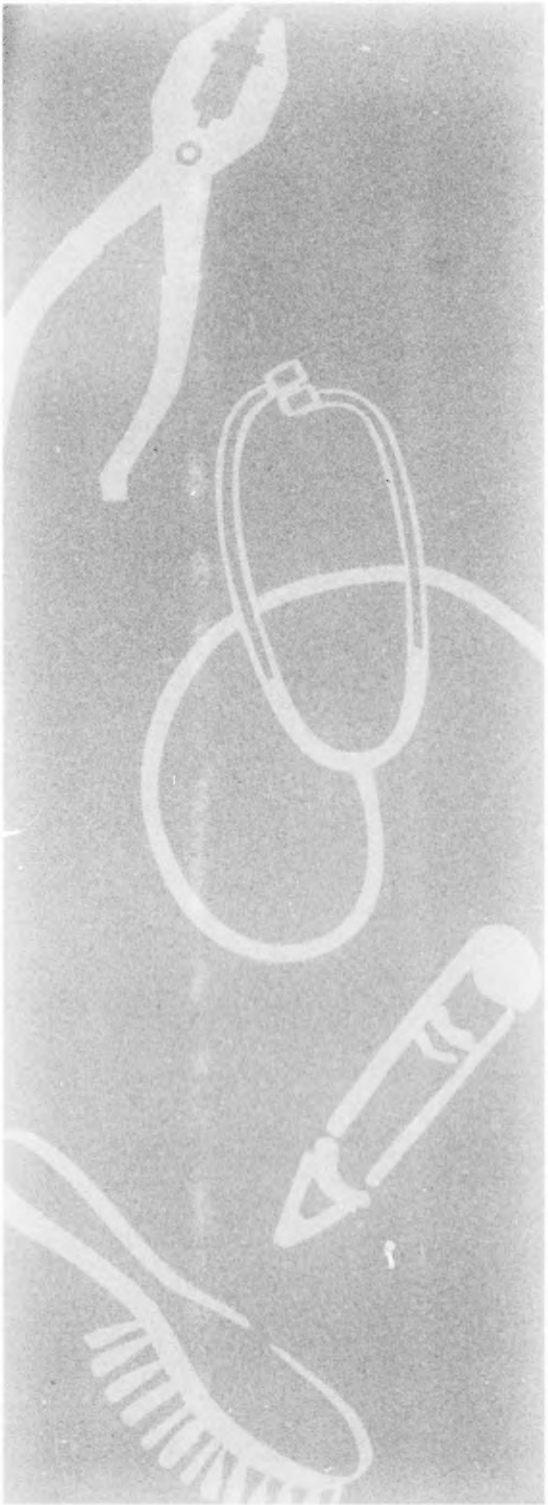
Self-Esteem. Believes in own self-worth and maintains a positive view of self, demonstrates knowledge of own skills and abilities, is aware of one's impression on others, and knows own emotional capacity and needs and how to address them.

Sociability. Demonstrates understanding, friendliness, adaptability, empathy, and politeness in new and ongoing group settings; asserts self in familiar and unfamiliar social situations; relates well to others; responds appropriately as the situation requires; and takes an interest in what others say and do.

Self-Management. Accurately assesses own knowledge, skills, and abilities; sets well-defined and realistic personal goals; monitors progress toward goal attainment and motivates self through goal achievement; and exhibits self-control and responds to feedback unemotionally and nondefensively.

Integrity/Honesty. Recognizes when being faced with making a decision or exhibiting behavior that may break with commonly held personal or societal values; understands the effects of violating these beliefs and codes on an organization, oneself, and others; and chooses an ethical course of action.

Learning A Living: A Blueprint for High Performance, A SCANS Report for America 2000, U.S. Dept. Of Labor (April 1992), pp. 81-84.



What worksite mentoring participants say about their experiences:

"[My company] recognizes the value of the [mentoring] program, not only for the student's learning experiences, but for the positive contribution they make to our workforce."

—Personnel manager

"I feel that students who have the opportunity to participate in the [mentoring] program should take advantage of it because it gives us valuable real life skills and experiences which will be of help to us throughout life."

—Senior high mentee

"The [mentoring] program has been a positive experience for my daughter in many ways. It has given her the chance to be a responsible, capable person in the workplace and she has learned how a job impacts your life while developing a positive work reference."

—Parent

"My most rewarding mentoring experience was watching her (mentee) gain insights into concepts that are difficult for a student to learn."

—Mentor

"[I enjoy] watching them grow into colleagues."

—Mentor

(Quotes taken from various Internet sites.)

And The National Employer Leadership Council Reports:
"...Companies [are] earning a return on investment ranging from 38 cents on the dollar to as much as $5.00 [from their worksite learning efforts].

In-Service Training

The Vocational Instructional Materials Laboratory (VIML) at The Ohio State University provides coaching and training that will prepare worksite mentors to provide quality work-based learning experiences. Workshops are available for each of the publications in this series (see page 61). For further information about these services, contact the VIML directly at 800/848-4815 X2-8300 or 614/292-8300.

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